



Washington State Transportation Commission

2014 WSF Summer Performance, Recreational & Policy Study - FROG Survey Report

Preface



Starting in 2010, the Washington State Transportation Commission (WSTC) changed the process for how research is conducted regarding Washington State Ferries (WSF). Before 2010, stand-alone research projects were executed, but some of the issues facing ferry operations are of a longitudinal nature (changes over time). The decision was therefore made to create the Ferry Riders' Opinion Group (FROG) and the Voice of Washington State (VOWS). FROG is an online community where ferry riders have an ongoing opportunity to weigh in on ferry issues through surveys and quick polls (single questions). VOWS is an online community where any Washington resident has a similar opportunity to weigh in on statewide and regional transportation issues.

The FROG research initiative in 2014 consists of the following main phases:

- Winter Customer Survey Study (target audience: commuter riders) via FROG
- Winter Policy Study (target audience: commuter riders) via FROG
- Freight Survey (target audience: WSF freight customers) via executive telephone survey
- General Market Assessment Survey (target audience: Puget Sound (PS) basin and non-PS residents (non-PS) via VOWS
- **Summer On-board Recreational Survey (target audience: Out of state riders)**
- **Summer Performance, Recreational, and Policy Study (target audience: commuter and social/recreational riders)**

The focus of this report is the Summer Ferry Performance Recreational Study

- In addition to FROG panel member data, onboard, in-person surveys conducted with ferry riders were also collected during for the Summer Customer Survey. The onboard surveys were collected in order to reach members of the general public with regard to specific survey objectives (recreational ferry riders). Throughout this report, the data from these onboard surveys is compared to FROG panel data where applicable, and referred to as “Onboard 2014.”

EMC Project # 14-5091

EMC was not part of the data collection process. Some percentages may not add up to 100% due to rounding.

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Methodology



- ▶ The following report presents the findings for the Summer 2014 survey. The main objective of this research is to understand from the ferry riders' prospective their travel behavior, opinions, and attitudes regarding important issues currently facing the Washington State Transportation Commission and Washington State Ferries.
 - This overall objective resulted in the following areas of exploration:
 - Summer travel activity – ferry travel from June through September 2014.
 - Social and recreational – understand role of ferries in the social and recreational summer travel.
 - Customer satisfaction – measure importance and satisfaction of terminal conditions, walk-on services, loading and unloading procedures, vessel conditions, and WSF website and telephone services.
 - Demographic characteristics of ferry customers – travel patterns, WSF satisfaction and demographic data.
- ▶ A total of three thousand twenty eight (n=3,028) ferry riders completed the Summer 2014 FROG Panel survey yielding a maximum sample variable of +/- 1.8% at the 95% confidence level.
 - Ferry riders completed a web survey which ended in September.
 - Due to respondents who either did not answer certain questions or selected no response or don't know, the question bases vary throughout the report.
- ▶ A total of six thousand fifty six (n=6,056) ferry riders completed the Summer 2014 onboard survey yielding a maximum sample variable of +/- 1.3% at the 95% confidence level.
 - Due to respondents who either did not answer certain questions or selected no response or don't know, the question bases vary throughout the report.
- ▶ In order to make the survey results proportionate to the ferry ridership universe as a whole, it was necessary to weight the data by route and boarding method based on their last trip taken.
 - Due to differing programming, the weighting method was slightly different for 2014.

Executive Summary



Rider Dissatisfaction

- *The percentage of riders saying they are dissatisfied with the service provided by WSF during the summer period has risen 8 points to 30% total dissatisfaction. However, onboard respondents are only 6% total dissatisfied, a decrease of 24 points. The Fauntleroy/Vashon route , Southworth/Vashon , Anacortes/San Juan, and Interisland routes all have higher dissatisfaction rates then the overall. The greatest shift from 2012 by route has been among Fauntleroy/Vashon and Fauntleroy/Southworth.*
- *The percentage of riders saying WSF is a “good” or “very good” value in the summer period has decreased significantly compared to 2012 (68% vs. 80%). Overall good value is down from summer 2012 across all routes with most significant decrease among riders using the Fauntleroy/Vashon route.*
- *Satisfaction remains positive across the four attributes tested; terminals are comfortable, WSF provides easy loading and unloading for walk-ons, WSF loading crews provide clear directions/ hand signals, and WSF Vessels are well maintained and safe. Loading crews providing clear directions, and vessels are well maintained and safe are the two highest priority attributes for summer respondents.*
- *Opportunity areas for improvement in Seattle/ Bremerton, Anacortes/ San Juan Islands, and Sound Juan Interisland, are the maintenance and safety of vessels. For Point Defiance/ Tahlequah, Fauntleroy/ Vashon, Fauntleroy/ Southworth, Southworth/ Vashon, Coupeville/ Port Townsend, Mukilteo/ Clinton, and San Juan Interisland, loading crews providing clear directions is the largest opportunity for improvement.*
- *80% of riders interviewed have used the WSF website. Of those 80%, only 6% say that they are either dissatisfied (5%) or very dissatisfied (1%).*

Executive Summary



Recreational and Social Travel

- ▶ *The vast majority of respondents most recent trip was in September, with Seattle/Bainbridge, Edmonds/Kingston, and Mukilteo/Clinton the top three last routes ridden for recreational riders.*
- ▶ *The majority (59%) boarded as either a vehicle driver or walked on. Of those that drove on, almost two thirds boarded in a mid sized auto/SUV/pick-up 14-22 feet. Since 2012 there has been a shift in ticket type usage. Summer riders are likely to use multi ride tickets as much or more than single ride tickets when traveling.*
- ▶ *Out and back on same route is the most popular crossing. ANA/SJI and ANA/BC continue to have the longest mean trip duration. The plurality of respondents describe visiting family or friends as the purpose of their last recreational trip.*
- ▶ *Most respondents say their most recent recreational or social trip was a WA State only trip. Both panel and onboard respondents say “only way” and “fastest way” are the primary reasons for choosing WSF rather some other way to make a recreational or social trip. Onboard respondents list the ferry experience as a top reason as well.*
- ▶ *Almost all respondents say they are likely to use WSF again for a recreational or social trip. Better schedules/routes is the top mentioned way to increase the number of recreational or social trips.*

Executive Summary



Policy

- ▶ *71% of respondents say funding for WSF capital needs is a major problem, with over a thirds (38%) saying the need requires immediate action. Only 2% of respondents say that capital funding for Washington State Ferries is a minor, or not at all a problem.*
- ▶ *The majority of respondents agree with statements around funding needs for capital and maintenance issues, with the statement around ferries needing major repair garnishing the most support (58%).*
- ▶ *For all agreement statements surrounding WSF funding, few respondents disagreed. However almost one third say that they don't know.*
- ▶ *Of the suggested funding methods offered by respondents, increasing vehicle registration along with increasing the statewide gas tax were the methods of funding capital needs most recommended.*



Recreational & Social Travel

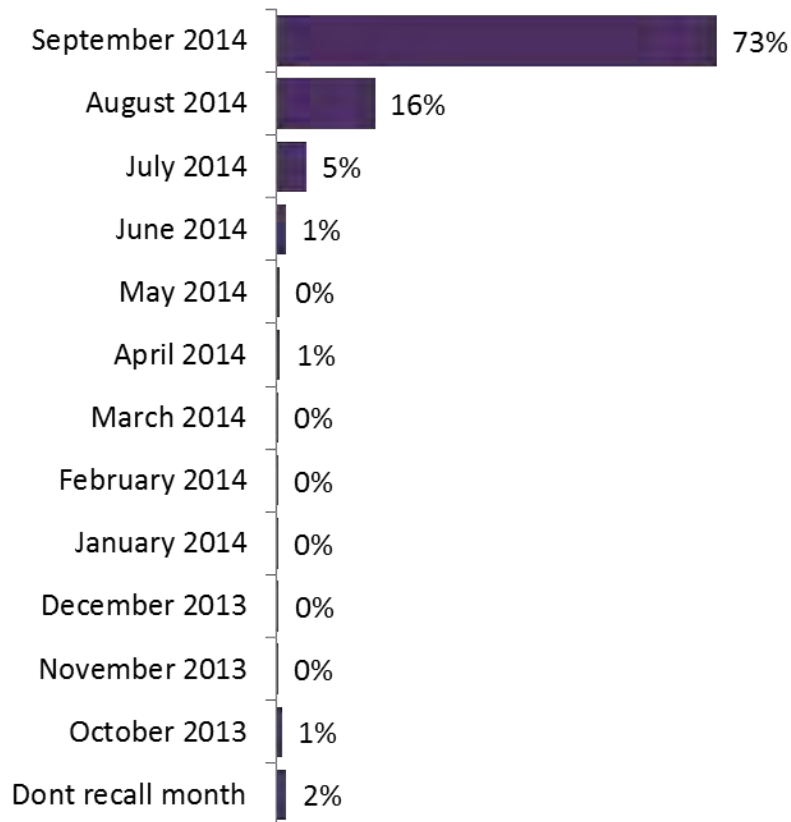
Last Recreational/Social Trip



The vast majority of respondents most recent trip was in September, with Seattle/Bainbridge, Edmonds/Kingston, and Mukilteo/Clinton the top three last routes ridden.

Month of last Recreational/Social Trip

n=2,924



Route of last Recreational/Social Trip

n=2,783

		2012	Shift
Seattle/ Bainbridge	26%	27%	-1%
Edmonds/ Kingston	17%	17%	0%
Mukilteo/ Clinton	16%	16%	0%
Anacortes/ San Juan Islands	11%	10%	+1%
Seattle/ Bremerton	9%	8%	+1%
Fauntleroy/ Vashon	7%	7%	0%
Coupeville/ Port Townsend	6%	5%	+1%
Point Defiance/ Tahlequah	3%	3%	0%
Fauntleroy/ Southworth	3%	3%	0%
Anacortes/ Sidney B.C.	1%	1%	0%
San Juan Interisland	1%	1%	0%
Southworth/ Vashon	1%	1%	0%

Q2. In which month did you take your most recent recreational or social trip that used WSF

Q3. What was the route that you rode for your most recent recreational or social trip

Most Recent Boarding Terminal



The following information outlines the boarding terminals on respondents' most recent recreational or social trip using WSF

Boarding Terminal Of Recreational Riders' Last Route Taken

Seattle/ Bainbridge		Seattle/ Bremerton		Point Defiance/ Tahlequah		Edmonds/ Kingston		Fautleroy/ Vashon		Fautleroy/ Southworth	
n=349		n=113		n=30		n=246		n=111		n=51	
Seattle	30%	Seattle	27%	Point Defiance	37%	Edmonds	39%	Fautleroy	40%	Fautleroy	37%
Bainbridge	70%	Bremerton	73%	Tahlequah	63%	Kingston	61%	Vashon	60%	Southworth	63%

Southworth/ Vashon		Coupeville/ Pt. Townsend		Mukilteo/ Clinton		Anacortes/ San Juan Islands		San Juan Interisland		Anacortes/ Sidney B.C.	
n=7		n=97		n=365		n=344		n=23		n=17	
Southworth	54%	Coupeville	61%	Mukilteo	26%	Orcas	18%	Orcas	27%	Anacortes	59%
Vashon	46%	Pt Townsend	39%	Clinton	74%	Shaw	1%	Shaw	1%	Sidney BC	41%
						Lopez	18%	Lopez	14%		
						Friday Harbor	30%	Friday Harbor	58%		
						Anacortes	33%				

Q4. To start with, from which terminal did you depart on your most recent trip?

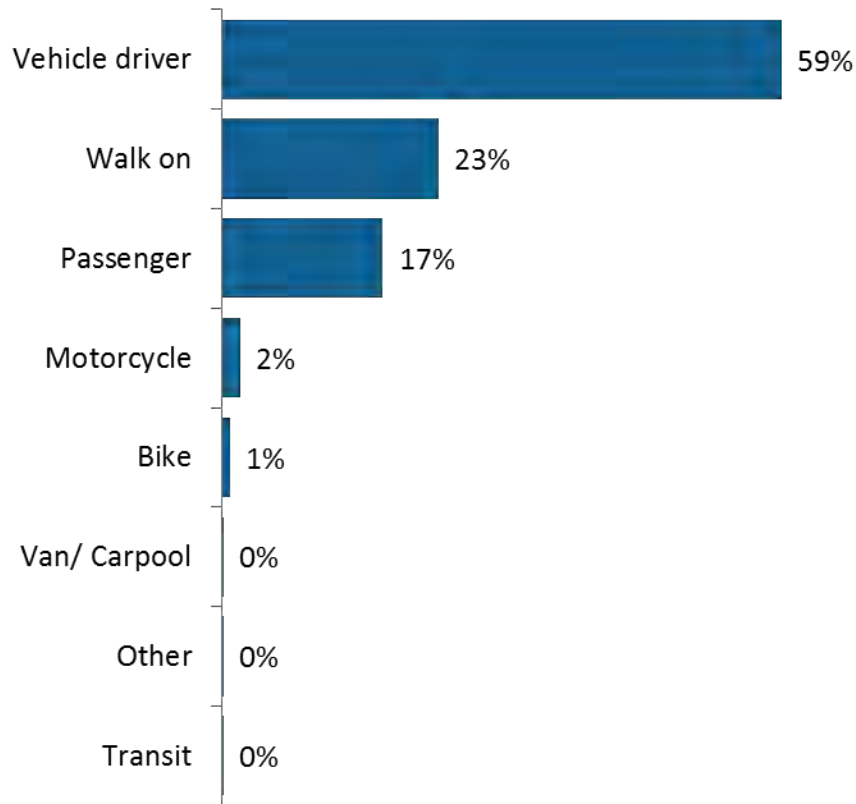
Boarding Method



The majority (59%) boarded as either a vehicle driver or walked on. Of those that drove on, almost two thirds boarded in a mid sized auto/SUV/pick-up 14-22 feet.

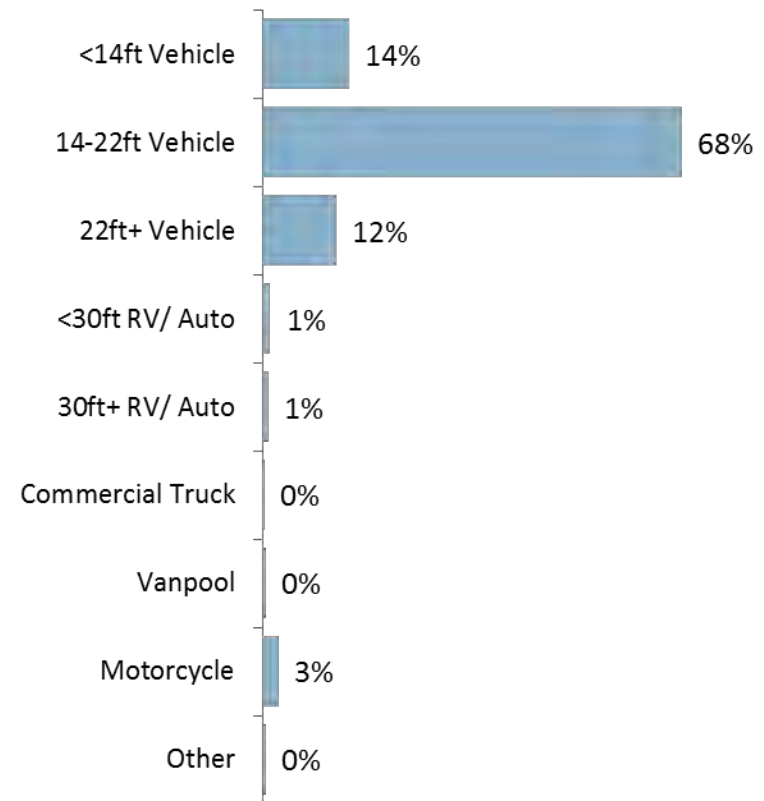
Boarding Method

n=2,870



Vehicle Type

n=2,173



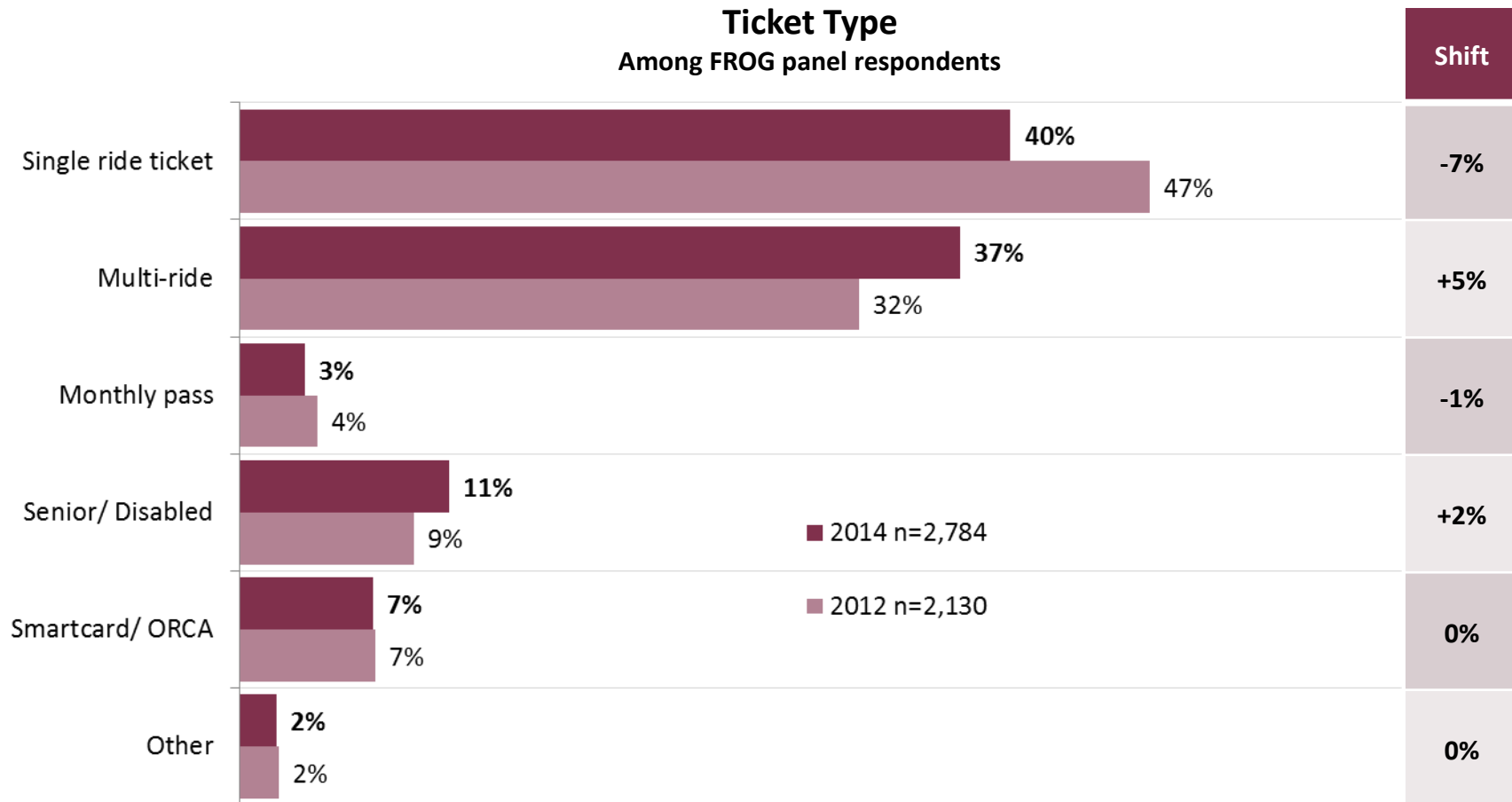
Q5. How did you board your last ferry ride

Q6. Which of the following best describes the vehicle you drove on the ferry?

Ticket Type



Since 2012 there has been a shift in ticket type usage. Summer riders are likely to use multi ride tickets as much or more than single ride tickets when traveling.



Q8. On what kind of ticket were you travelling?

Crossings and Trip Duration

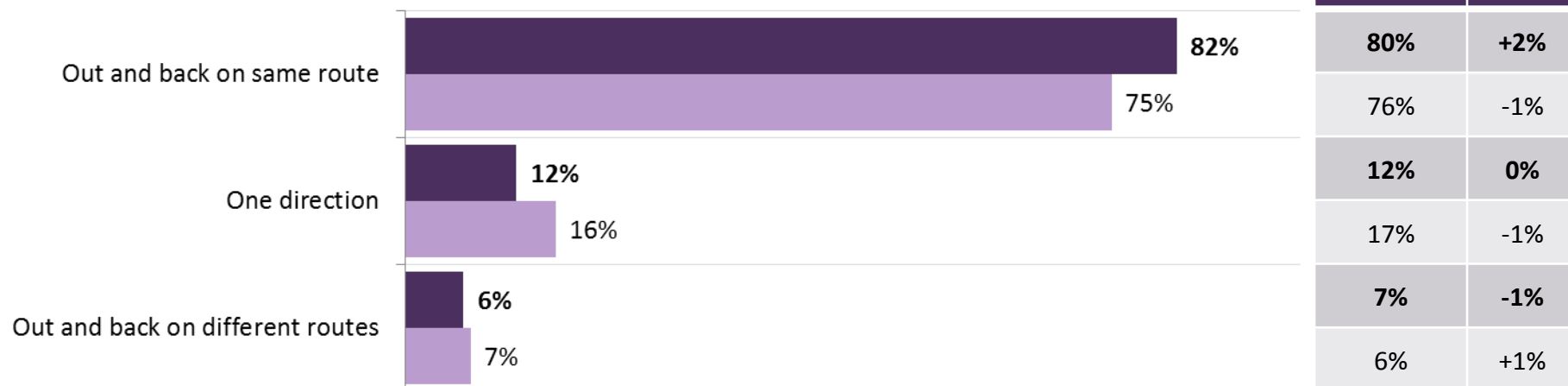


Out and back on same route is the most popular crossing for both panel and onboard respondents. ANA/SJI and ANA/BC continue to have the longest mean trip duration.

Number of Crossings on Most Recent Trip

■ Panel n=2,784

■ Onboard n=1,432



Trip Duration		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		2,753	633	213	56	343	216	107	18	110	548	446	41	22
2014	Mean number of days	2	2	1	2	2	2	1	2	3	2	4	2	5
2012	Mean number of days	1	1	1	1	1	1	1	1	3	1	3	1	4

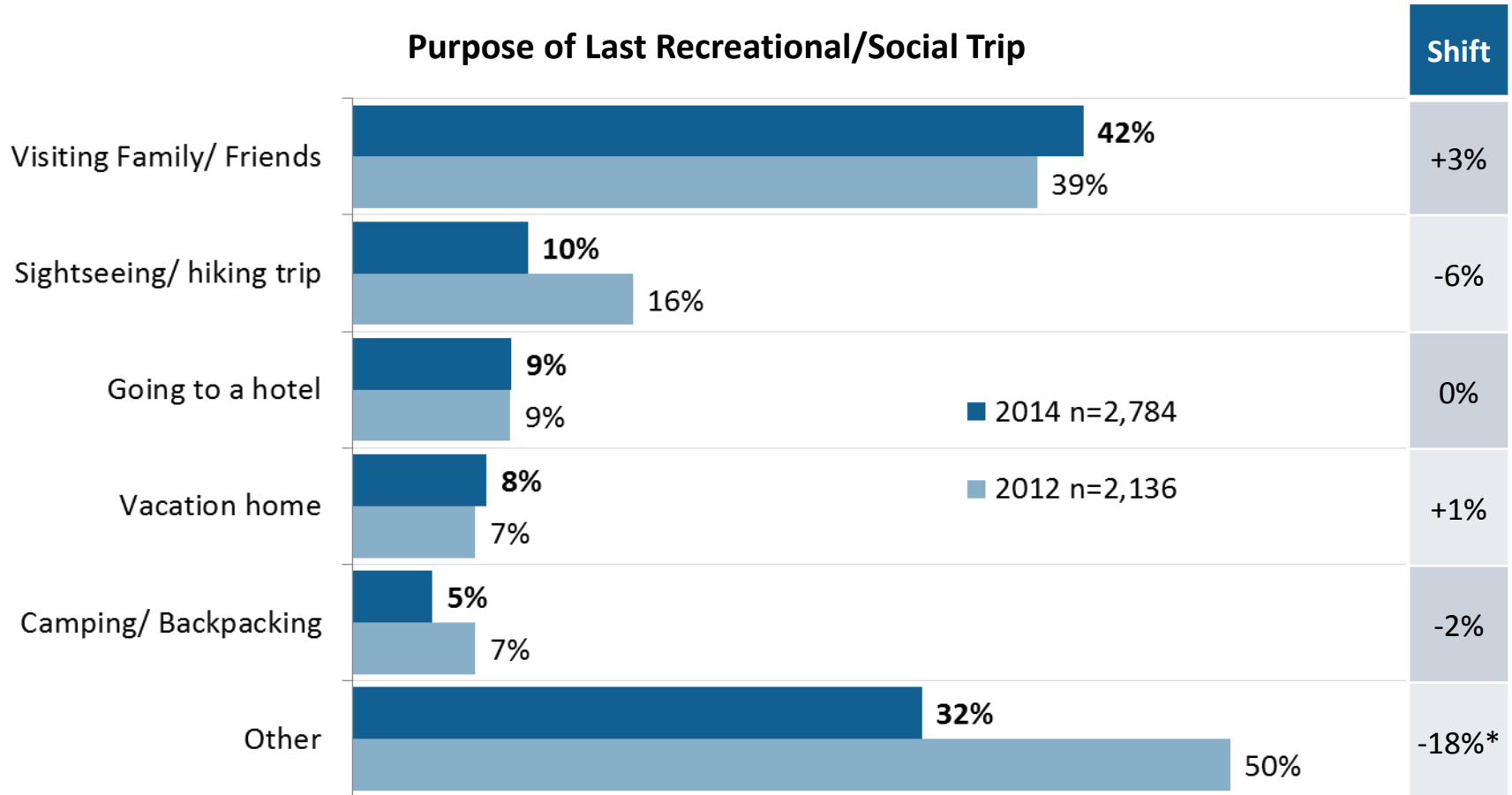
Q11. How many crossings or sailings on Washington State Ferries (WSF) did you take

Q10. What was the duration (# of days from when you left home to when you returned home) of the trip

Recreational/Social Trip Purpose



The plurality of respondents describe visiting family or friends as the purpose of their last recreational trip.



Q12. Which of the following best describes your most recent recreational or social trip

*2012 has 4 more categories, which have been collapsed into 'other', amounting to an increase of 16%.

Destination & Relative Ferry Cost

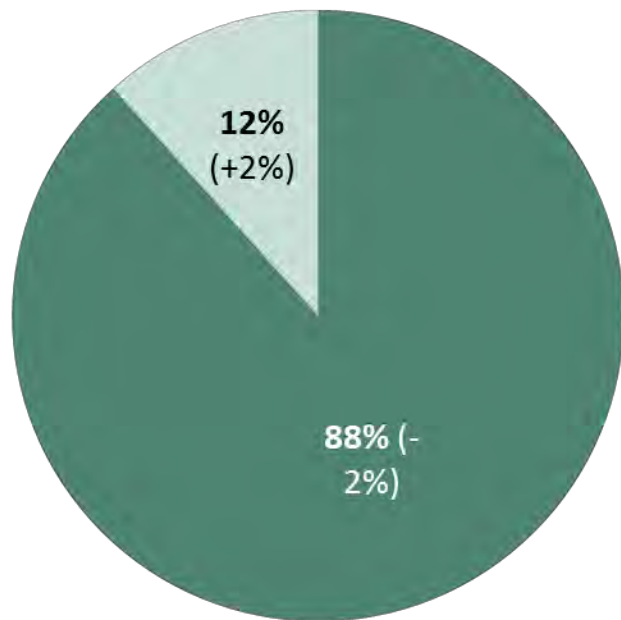


Most respondents say their most recent recreational or social trip was a WA State only trip. Total cost of the ferry fare for the trip is more significant for panel members than for the onboard.

Destination of Last Recreational/Social Trip

n=2,783

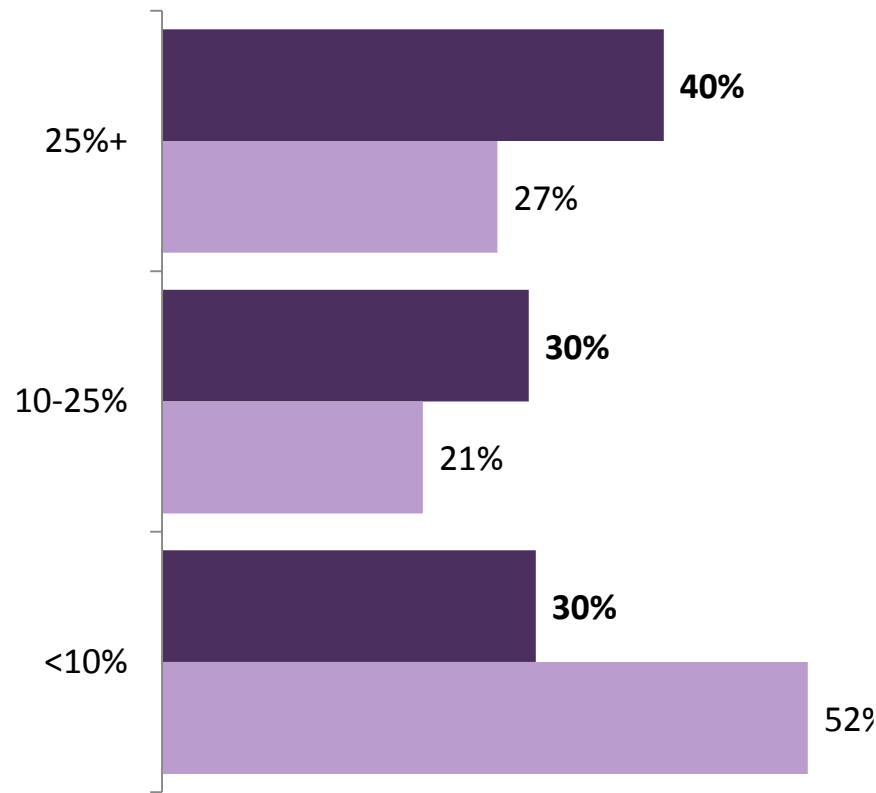
■ Washington State ■ Multistate/Multination



Relative Cost of Last Recreational/Social Trip

■ Panel n=2,784

■ Onboard n=1,418



2012 n=2,127	Shift
40%	0%
33%	-6%
27%	+3%
22%	-1%
33%	-3%
45%	+7%

Q13. Was your most recent recreational or social trip part of a...

Q14. How significant was the ferry fare to the total cost (gas/food/lodging/etc.) of your most recent trip?

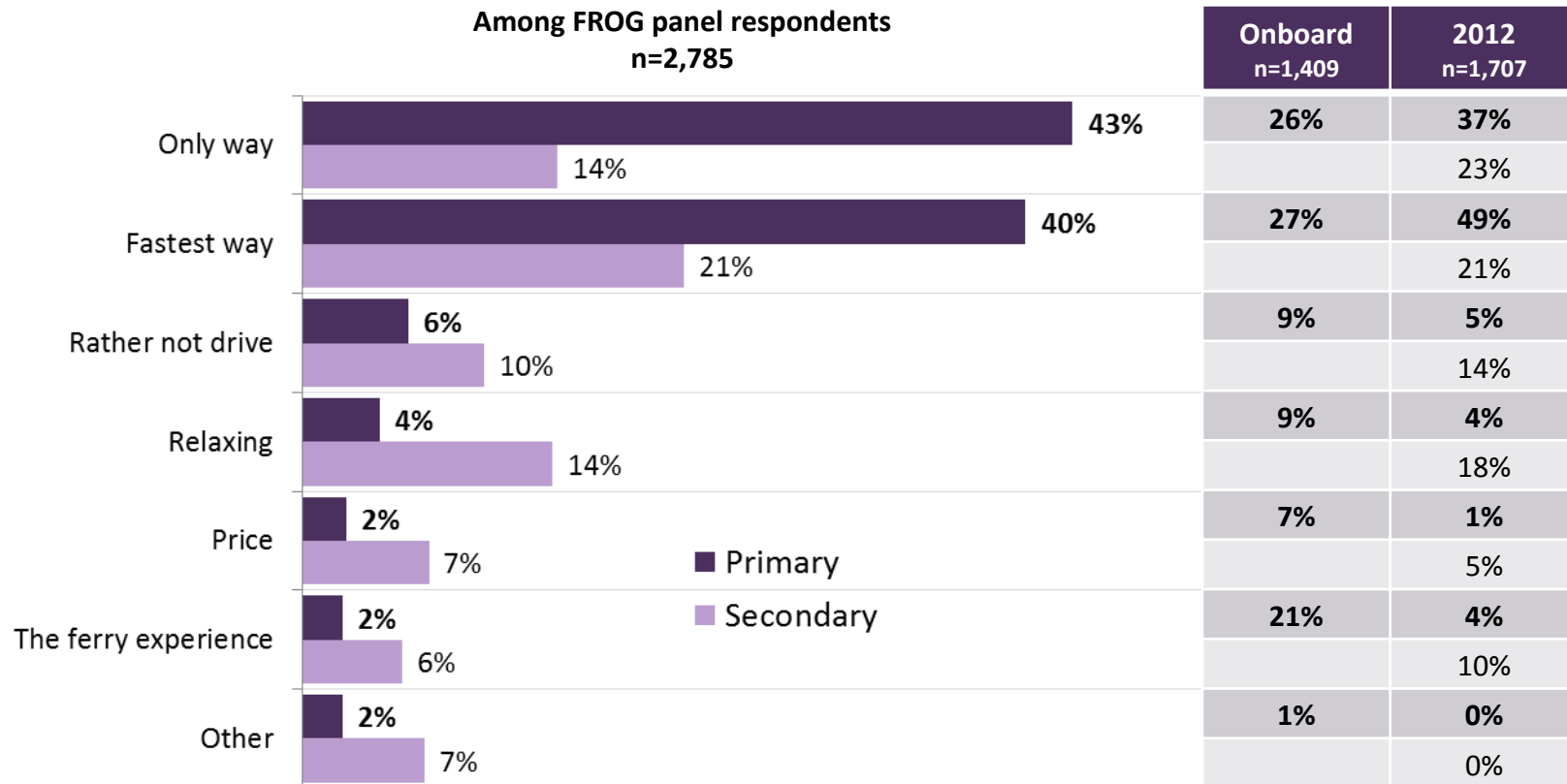
Factors Driving Ferry Decision



Both panel and onboard respondents say “Only way” and “fastest way” are the primary reasons for choosing WSF rather some other way to make a recreational or social trip. Onboard respondents list the ferry experience as a top reason as well.

Factors determining ferry travel

Among FROG panel respondents
n=2,785



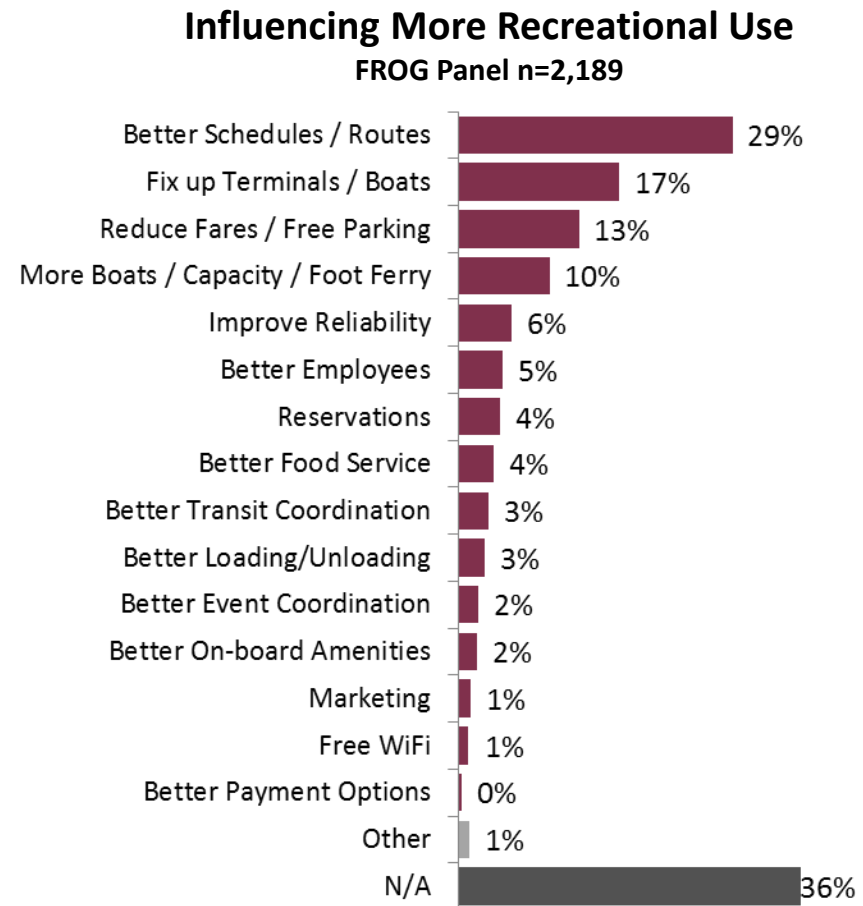
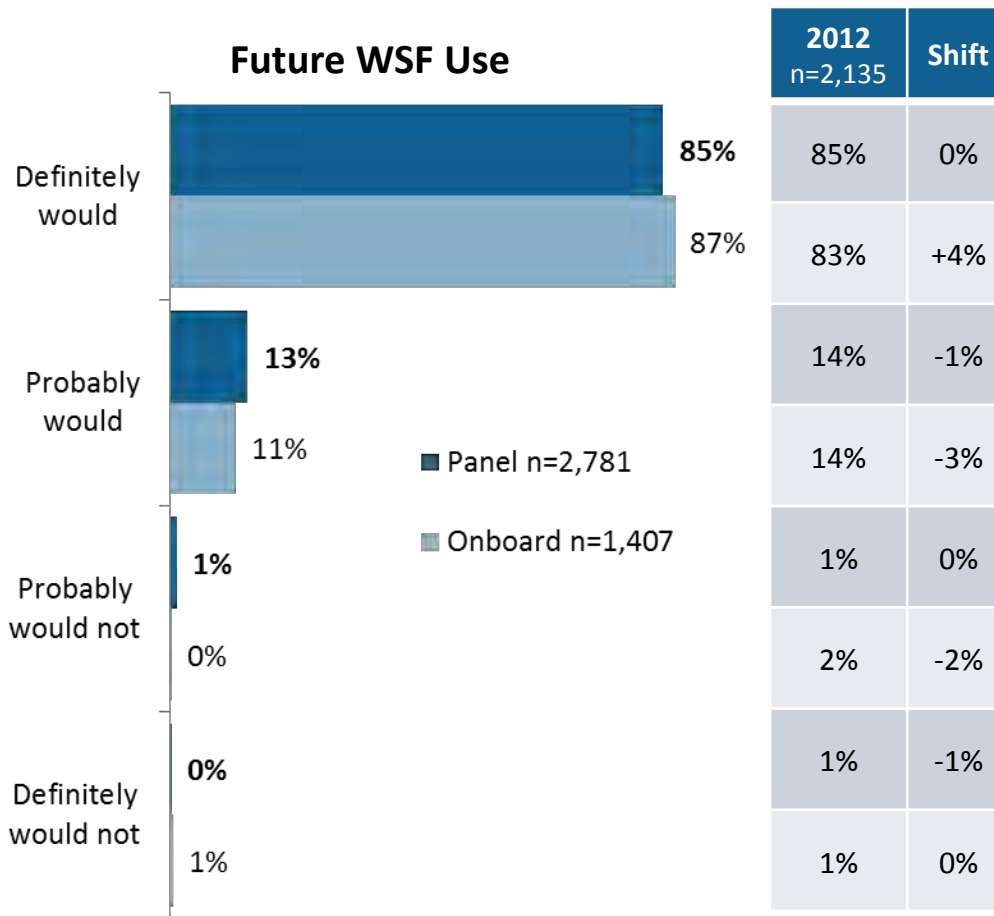
Onboard n=1,409	2012 n=1,707
26%	37%
	23%
27%	49%
	21%
9%	5%
	14%
9%	4%
	18%
7%	1%
	5%
21%	4%
	10%
1%	0%
	0%

Q15a. Which of the following reasons best describes why you chose WSF rather than some other way to make your most recent recreational or social trip
Q15b. Which other reasons describe why you chose WSF rather than some other way to make your most recent recreational or social trip

Future Recreational/Social Use



Almost all respondents say they are likely to use WSF again for a recreational or social trip. Better schedules/routes is the top mentioned way to increase the number of recreational or social trips.



Q16. How likely would you be to consider using Washington State Ferries again for a recreational or social trip? Would you say you...

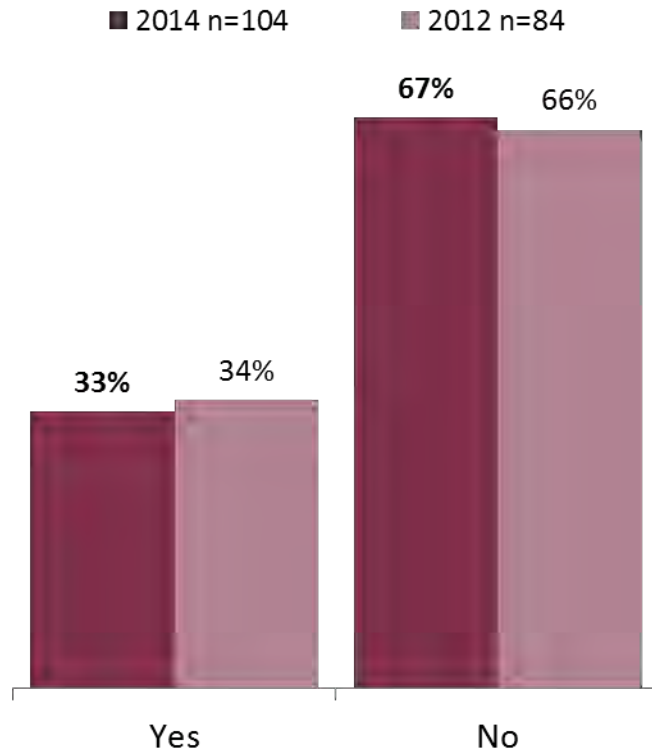
Q18. Besides lowering fares, what, if anything, could Washington State Ferries do to help increase the number of recreational or social ferry trips that people, like you, make in a year?

Non-Recreational/Social Riders

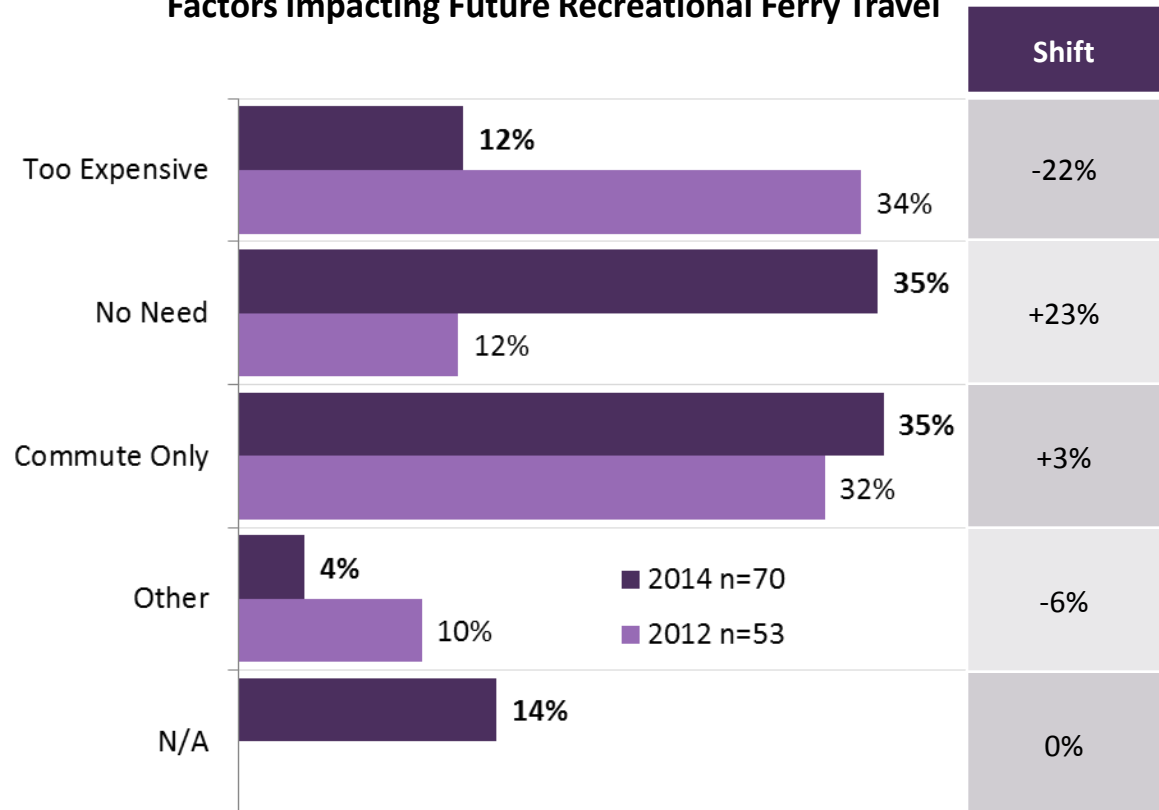


Only 3% of respondents say they have not taken a recreational/social trip using the ferries during the summer period—of those 3%, 67% say they do not plan on taking a trip, with the top reason being that they use the ferries for commuting only or have no need to take a recreational trip; Cost is not really a factor (12%) here.

2014 Expected Recreational Use (Among Non-recreational Travelers)



Factors Impacting Future Recreational Ferry Travel



Q27. Are you planning on taking any social or recreational trips using WSF later this year

Q30. Why are you not likely to take social or recreational trips using Washington State Ferries

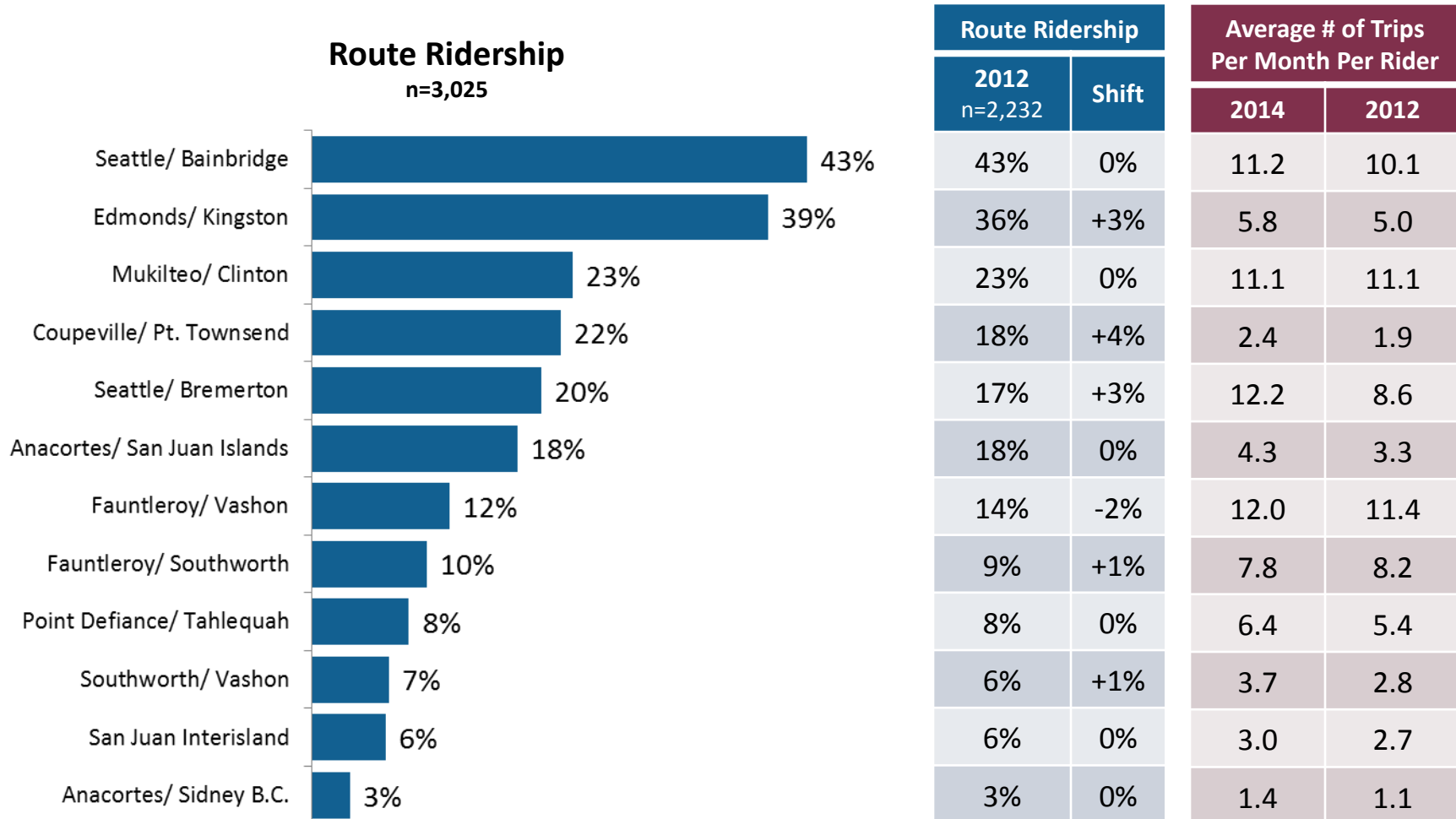


Travel Activity

Summer Period Ridership Overall



The routes with the highest ridership are Seattle/Bainbridge, Edmonds/Kingston, and Mukilteo/Clinton. The average number of trips per month and route ridership remains fairly similar with the 2012 results.



Q21. which of the following route(s) have you ridden for any purpose during the Summer period

Q22. How many round trips(2 one-ways = 1 round trip, 3 one-ways = 2 round trips) did you take per month, on average, during the summer period

Ridership – Commuting Trips



Seattle/Bremerton and Fauntleroy/Southworth, and Seattle/Bainbridge have the highest percentage of commuting trips per month, with Coupeville/Pt. Townsend and Anacortes/Sidney BC the lowest.

Ratio of Trips by Purpose

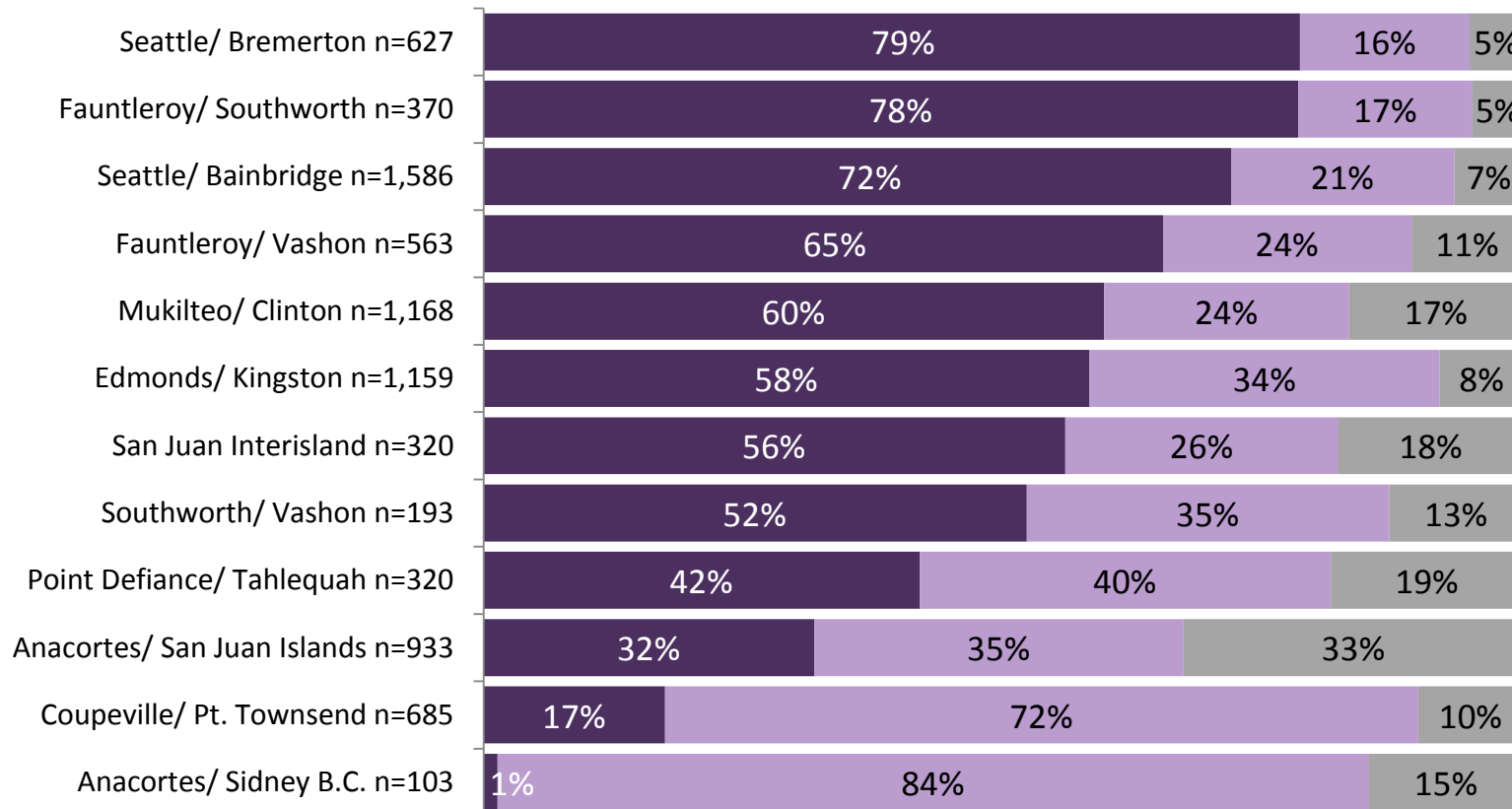
(Of Those Who Rode Route)

■ Commuting

■ Recreational/social

■ Other

% Commuting	
2012	Shift
75%	+4%
78%	0%
73%	-1%
61%	+4%
60%	0%
51%	+7%
46%	+10%
43%	+9%
29%	+13%
23%	+9%
16%	+1%
9%	-8%



Q23. How many of those per month round trips, for each route, were for the primary purpose of commuting, how many were primarily recreational/social purposes, and how many were for other purposes? (percentages based on total number of rides, and therefore not weighted)

Boarding Method



Seattle/Bremerton and Seattle Bainbridge have the highest proportion of walk-on travelers; on all other routes, drive-on is the highest percentage.

Ratio of Trips by Boarding Method

(Of Those Who Rode Route)

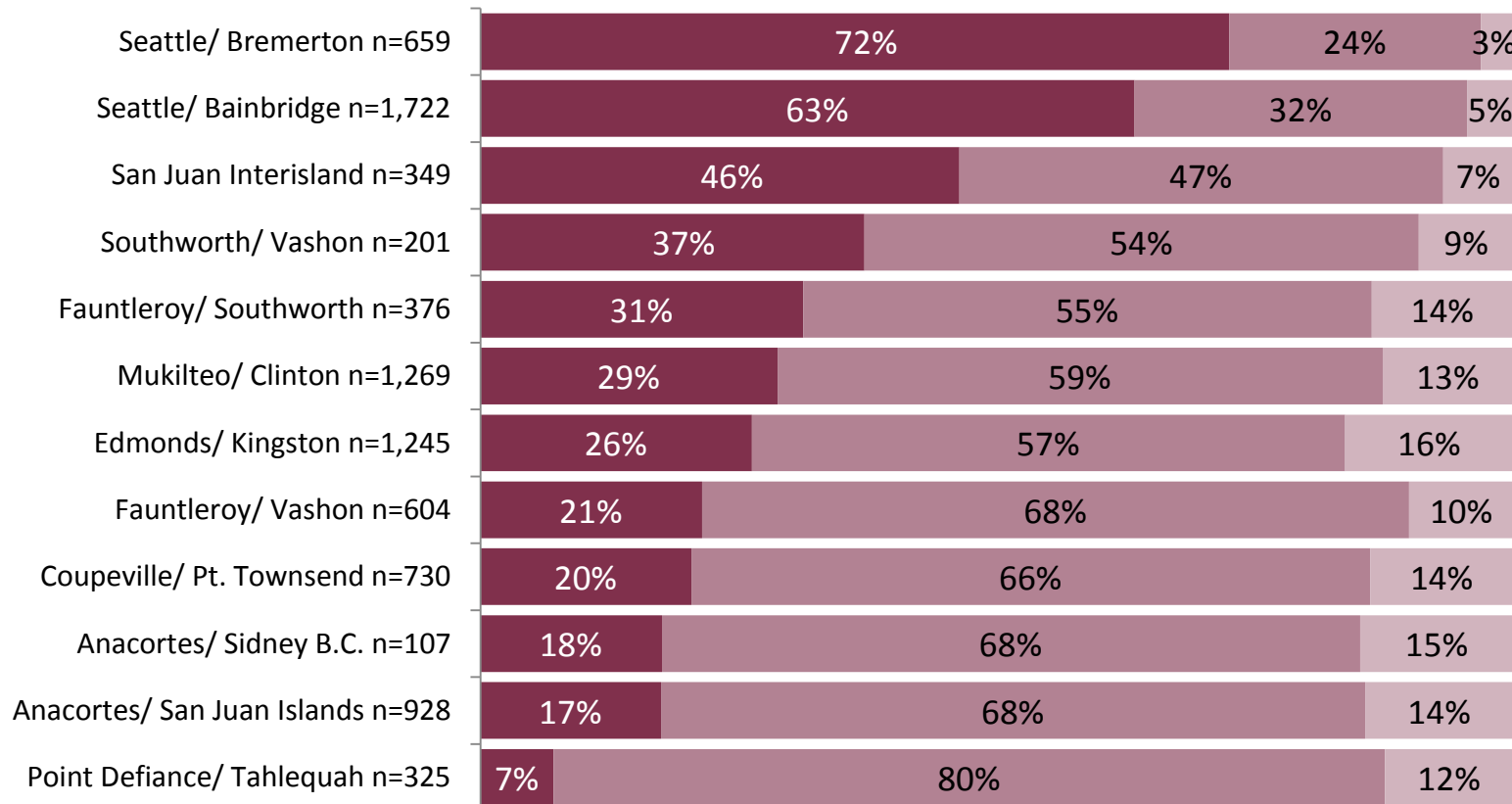
Walk-on

Drive-on

Passenger

% Walk-on

2012	Shift
70%	+2%
64%	-1%
39%	+7%
34%	+3%
17%	+14%
26%	+3%
27%	-1%
23%	-2%
20%	0%
17%	+1%
22%	-5%
13%	-6%



Q25. During the Summer period (June 15th through September 20th)... How many of your ferry trips per month for each route were boarded using the following methods? (percentages based on total number of rides, and therefore not weighted)

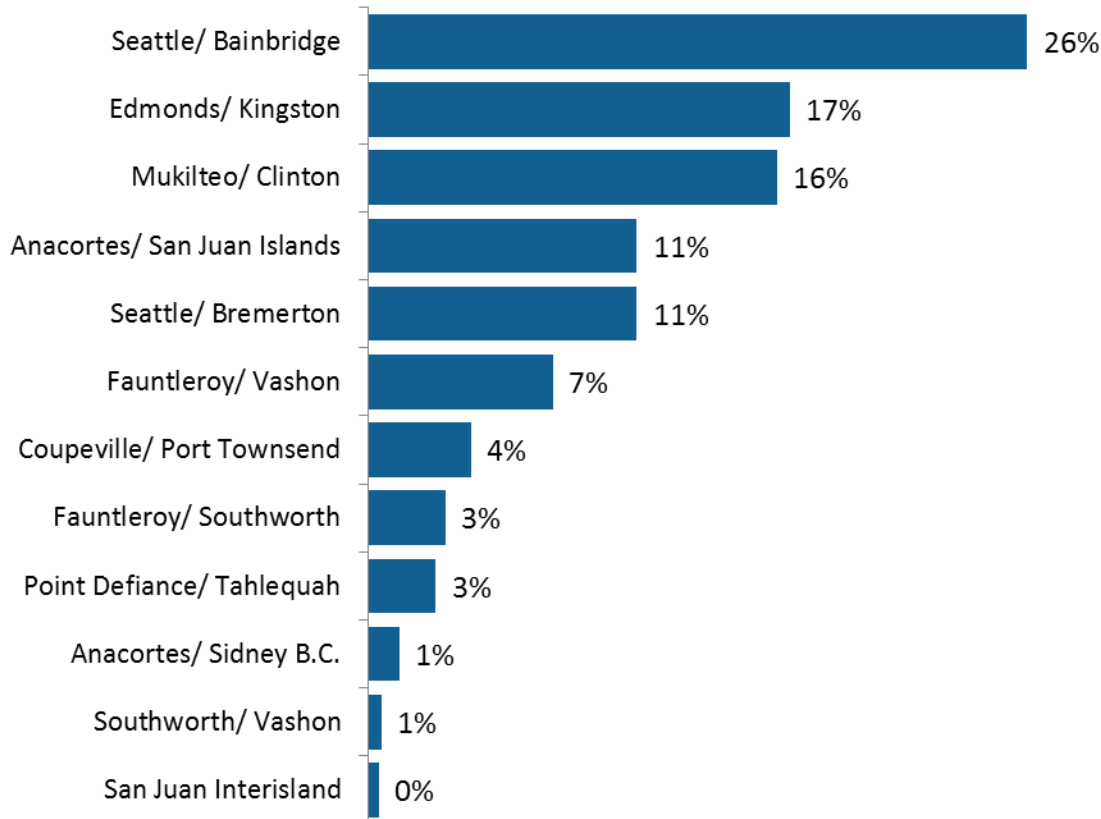
Last Ferry Ride – Route



Seattle/ Bainbridge remains the most recent route ridden.

Last Route Ridden

n=3,028



FROG Panel Responses		Onboard	
2012 n=2,135	Shift	2014 n=1,619	2012 n=3,503
29%	-6%	33%	44%
17%	+3%	16%	15%
11%	+5%	11%	19%
18%	-6%	5%	8%
9%	0%	15%	0%
9%	-1%	9%	9%
5%	-1%	3%	5%
4%	0%	4%	0%
4%	-2%	3%	0%
1%	+1%	0%	0%
1%	0%	1%	0%
1%	0%	0%	0%

Q31. What was the last route that you rode for any purpose (Merged with Q3)

Last Ferry Ride – Boarding Terminal



The figures below outline the boarding terminals for respondents' most recent ferry trip

Boarding Terminal Of Those Who Rode Route Last

Seattle/ Bainbridge		Seattle/ Bremerton		Point Defiance/ Tahlequah		Edmonds/ Kingston		Fauntleroy/ Vashon		Fauntleroy/ Southworth	
n=684		n=258		n=63		n=371		n=230		n=128	
Seattle	28%	Seattle	30%	Point Defiance	32%	Edmonds	39%	Fauntleroy	33%	Fauntleroy	30%
Bainbridge	72%	Bremerton	70%	Tahlequah	68%	Kingston	61%	Vashon	67%	Southworth	70%

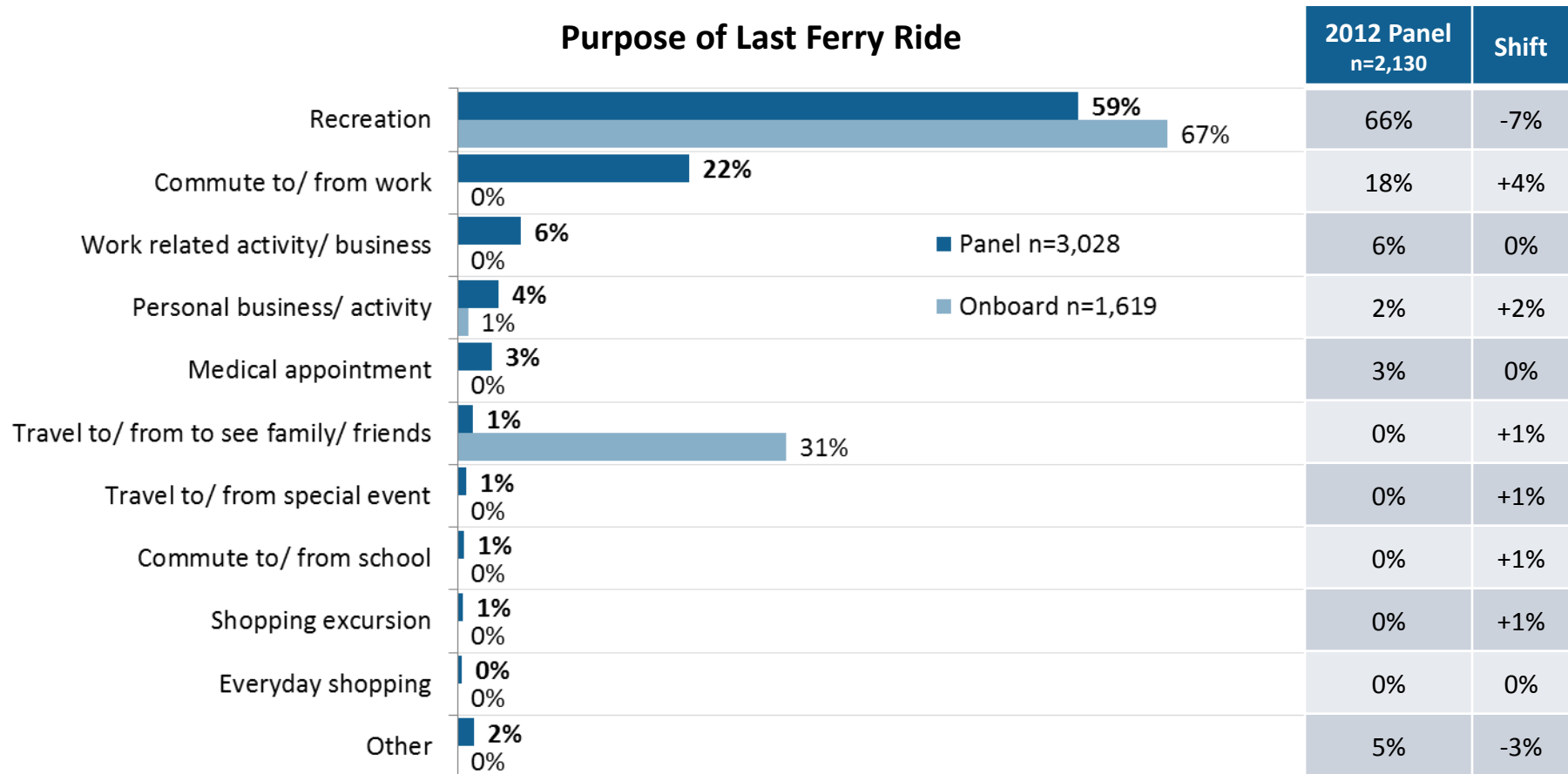
Southworth/ Vashon		Coupeville/ Pt. Townsend		Mukilteo/ Clinton		Anacortes/ San Juan Islands		San Juan Interisland		Anacortes/ Sidney B.C.	
n=19		n=115		n=602		n=212		n=31		n=23	
Southworth	63%	Coupeville	59%	Mukilteo	26%	Orcas	40%	Orcas	53%	Anacortes	63%
Vashon	37%	Pt Townsend	41%	Clinton	74%	Shaw	4%	Shaw	17%	Sidney BC	37%
						Lopez	13%	Lopez	29%		
						Friday Harbor	27%	Friday Harbor	1%		
						Anacortes	16%				

Q32. From which terminal did you depart on your most recent trip (Combined with Q4)

Purpose of Last Ferry Ride



A majority (59%) say that the purpose of their last ferry ride during the summer period was recreational, a decrease of 7% from 2012. Compared to onboard respondents, 67% said their last trip was for recreation, with 31% saying it was to travel to see family or friends (an increase of 30% over the panel data).



Q33. Thinking about your LAST FERRY RIDE ONLY on the [INSERT] route, which of the following was the primary purpose of that specific trip (merged with Q3B)

Purpose of Last Ferry Ride – By Route



Edmonds/Kingston, Coupeville/Pt. Townsend, Mukilteo/Canton, Anacortes/San Juan Island, and Anacortes/Sidney BC have significantly more riders saying their last ride was for recreational purposes. Seattle/Bremerton and Southworth/Vashon have the largest percentage of commuters.

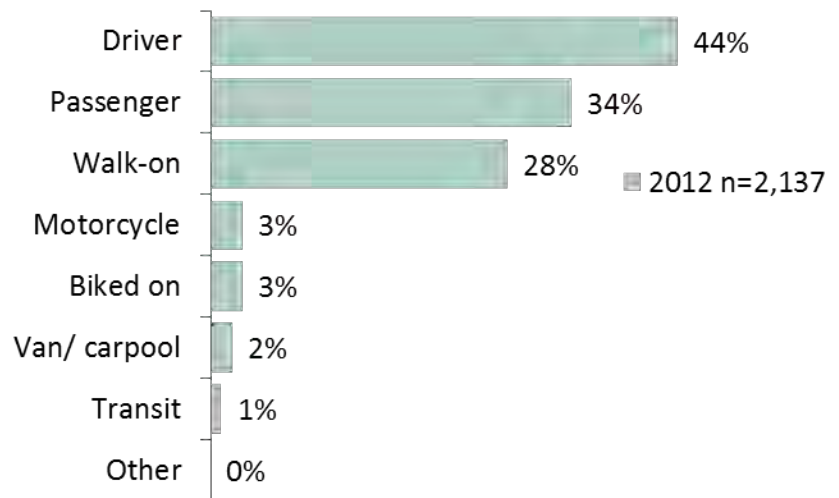
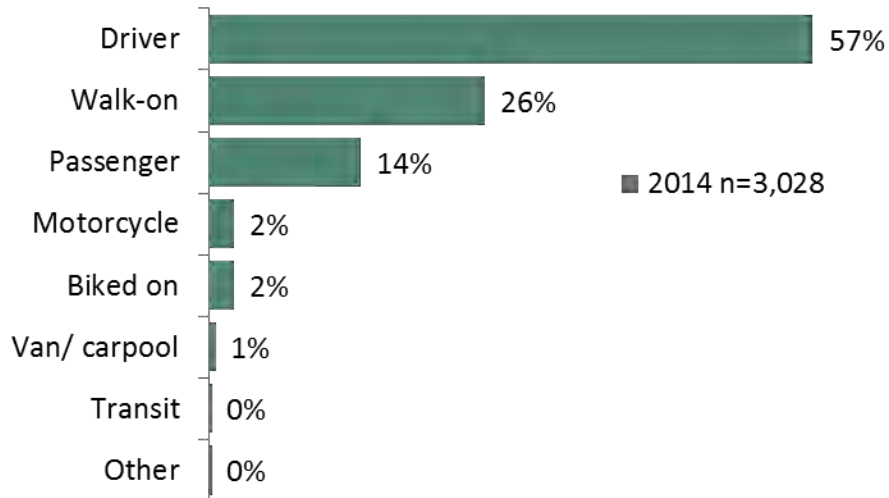
Purpose of Last Ferry Ride 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	1,274	335	145	33	125	119	77	12	18	238	143	23	6
Recreation	59%	52%	44%	49%	67%	49%	48%	34%	84%	62%	71%	53%	83%
Commute to/ from work	22%	30%	41%	9%	16%	24%	34%	45%	4%	17%	5%	12%	0%
Work related activity/ business	6%	7%	7%	6%	6%	7%	5%	6%	3%	5%	5%	12%	3%
Personal business/ activity	4%	3%	2%	5%	3%	8%	5%	5%	2%	4%	6%	7%	3%
Medical appointment	3%	3%	1%	9%	1%	7%	1%	0%	0%	4%	6%	7%	0%
Travel to/ from to see family/ friends	1%	1%	0%	5%	2%	2%	0%	0%	3%	2%	2%	3%	3%
Tourism/ recreation	1%	1%	1%	2%	1%	1%	0%	0%	3%	1%	0%	4%	9%
Travel to/ from special event	1%	1%	1%	5%	1%	0%	3%	5%	0%	1%	0%	3%	0%
Commute to/ from school	1%	1%	1%	2%	0%	0%	0%	6%	1%	1%	0%	0%	0%
Shopping excursion	1%	0%	1%	3%	0%	0%	1%	0%	0%	1%	1%	0%	0%
Everyday shopping	0%	0%	0%	6%	0%	0%	0%	0%	0%	1%	1%	0%	0%
Other	2%	1%	1%	0%	2%	1%	1%	0%	1%	2%	3%	0%	0%

Q33. Thinking about your LAST FERRY RIDE ONLY on the [INSERT] route, which of the following was the primary purpose of that specific trip (merged with Q3B)

Boarding Method of Last Ferry Ride



Drive on boarding has increased 13% since 2012, with passengers decreasing to 14%, making walk-on boarding replace passengers as the second highest method for boarding.



Boarding Method of Last Ferry Ride 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Vehicle driver	57%	42%	29%	77%	63%	72%	76%	46%	65%	73%	62%	79%	52%
Vehicle passenger	14%	8%	7%	9%	25%	15%	9%	5%	19%	17%	16%	17%	9%
Motorcycle	2%	2%	3%	4%	2%	1%	4%	17%	2%	3%	1%	0%	0%
Van/ carpool	1%	0%	0%	0%	1%	0%	3%	0%	0%	1%	0%	0%	0%
Walk-on	26%	43%	58%	10%	12%	11%	7%	31%	14%	10%	21%	7%	39%
Biked on	2%	6%	4%	0%	1%	1%	1%	6%	0%	1%	1%	4%	0%
Transit	0%	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%
Other	0%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%

Q34. In which of the following ways have you boarded the ferry (combined with Q5)

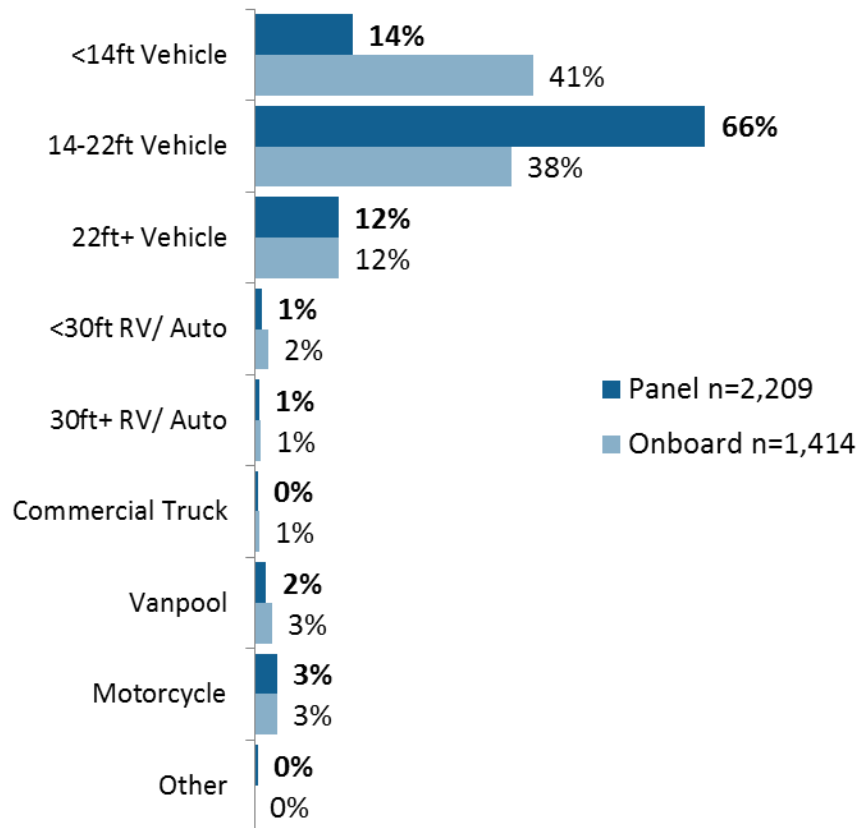
Vehicle Drove on for Last Ferry Ride



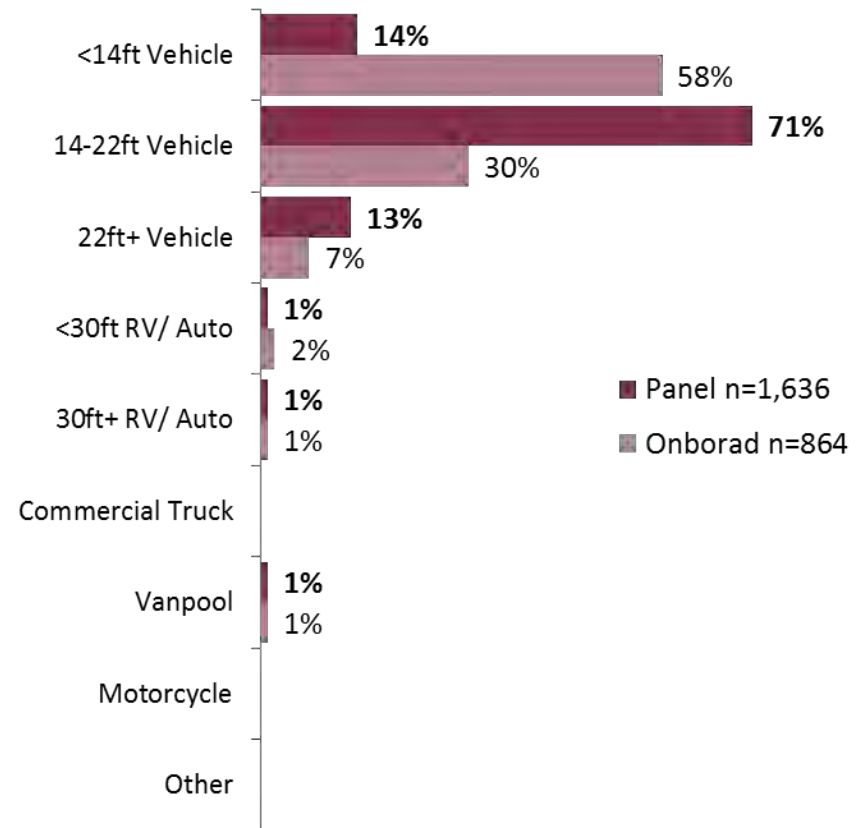
As with 2012, midsize auto/SUV/Pickup 14-22ft is the main method of boarding.

(note: an explanation for the discrepancy between onboard and panel data may be attributed to the panel getting visual examples of the cat orgies, where as the onboard respondents did not receive that)

2014 Vehicle Type



2012 Vehicle Type

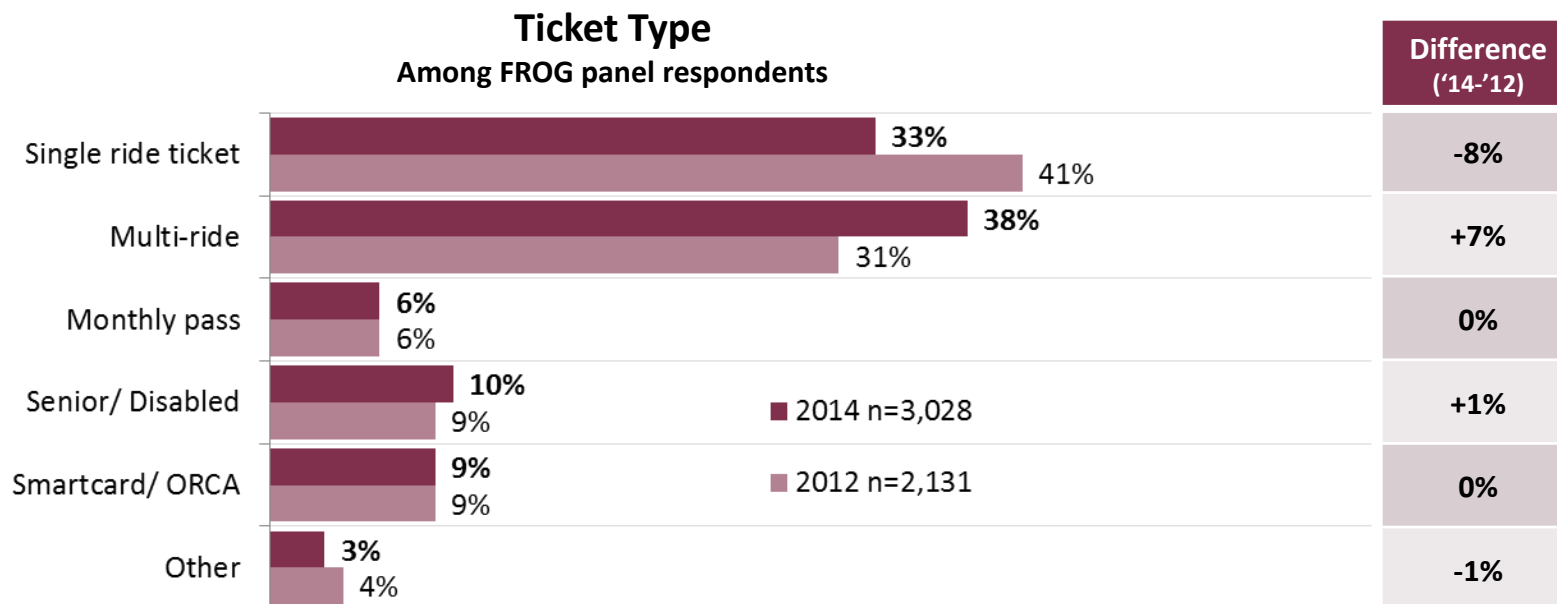


Q35. Which of the following best describes the vehicle you drove on the ferry? (merged with Q6)

Ticket Type



Since 2012 there has been a shift in ticket type usage. Summer riders are likely to use multi ride tickets as much or more than single ride tickets when traveling.



Ticket Used on Last Ferry Ride 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	3,028	685	258	63	371	230	128	19	115	603	487	46	23
Multi-ride	38%	31%	21%	80%	26%	68%	36%	43%	7%	50%	60%	47%	9%
Single ride ticket	33%	28%	32%	17%	47%	15%	34%	9%	74%	29%	31%	37%	77%
Senior/ Disabled	10%	11%	9%	2%	17%	5%	8%	5%	15%	12%	5%	3%	9%
Smartcard/ ORCA	9%	17%	24%	2%	4%	6%	12%	25%	0%	3%	1%	3%	6%
Monthly pass	6%	10%	12%	0%	4%	2%	5%	6%	1%	3%	0%	0%	0%
Other	0%	0%	1%	0%	2%	5%	5%	6%	3%	2%	3%	10%	0%

Q37. On what kind of ticket were you travelling? (merged with Q8)



Rider Satisfaction

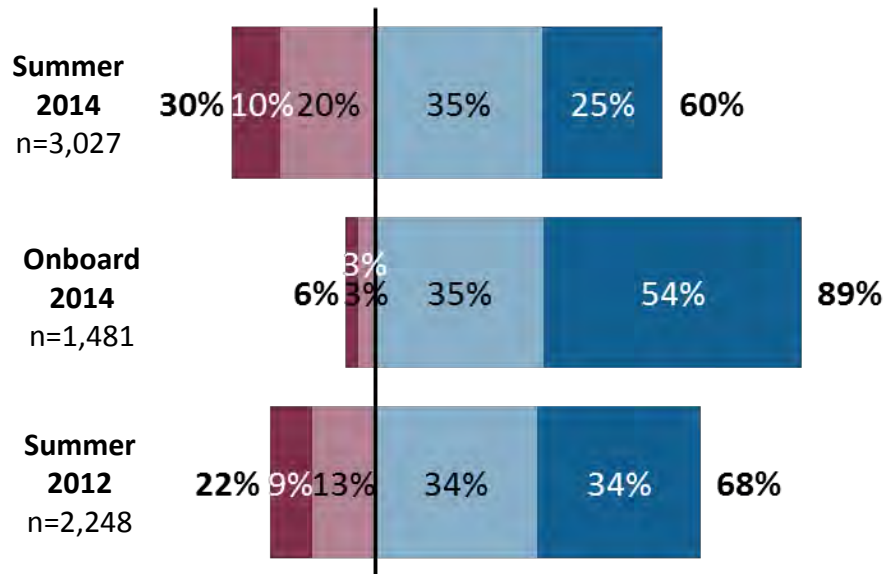
Overall Satisfaction



The percentage of riders saying they are satisfied with the level of service provided by WSF during the summer months has fallen overall compared to 2012 (60% vs. 68%). Onboard survey respondents are more satisfied by a 29 point margin. The Fauntleroy/Vashon route, Southworth/Vashon, Anacortes/San Juan, and Interisland routes all have higher dissatisfaction rates than the overall. The greatest shift from 2012 by route has been among Fauntleroy/Vashon and Fauntleroy/Southworth.

Overall Satisfaction with WSF

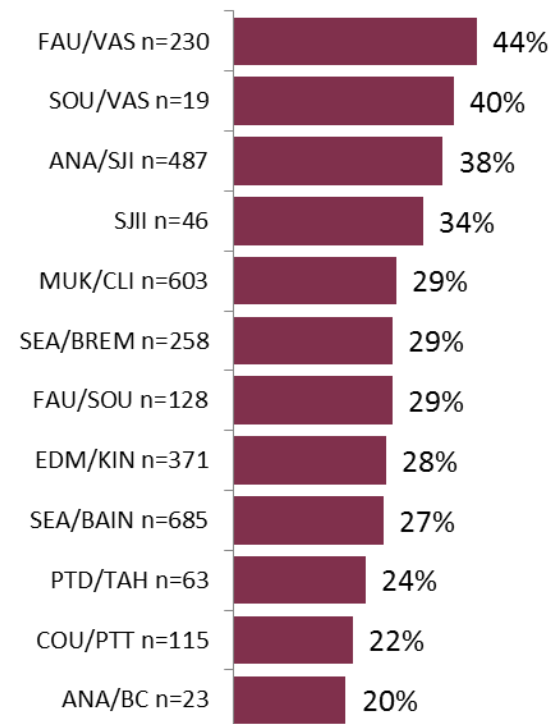
■ Extremely dissatisfied ■ Dissatisfied ■ Satisfied ■ Extremely satisfied



*Only ratings of satisfaction (4-5) or dissatisfaction (1-2) are shown,
Ratings of 3 or don't know are not shown.*

*The **bold** percentages represents the corresponding total dis/satisfaction*

**Overall Dissatisfaction by Route
(Total Dissatisfied)**



2012	Shift
21%	+23%
52%	-12%
34%	+4%
36%	-2%
29%	0%
20%	+9%
15%	+14%
22%	+6%
19%	+8%
17%	+7%
20%	+2%
11%	+9%

Q20. For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Summer period, June 15th through September 20th. All things considered, how satisfied are you with the service provided by Washington State Ferries during the Summer period?

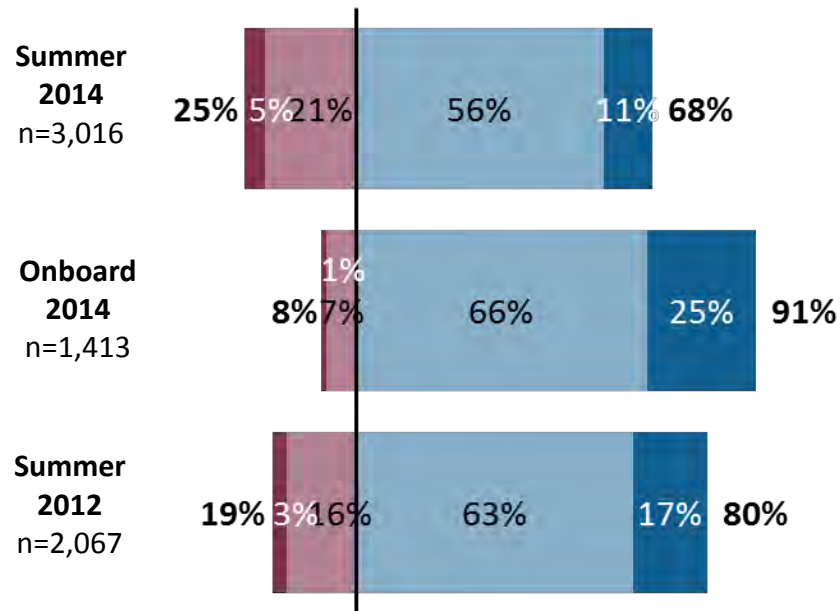
Overall Value



The percentage of riders saying WSF is a “good” or “very good” value in the summer period has decreased significantly compared to 2012 (68% vs. 80%). Overall good value is down from summer 2012 across all routes with most significant decrease among riders using the Fauntleroy/Vashon route.

Overall Perceived Value of WSF

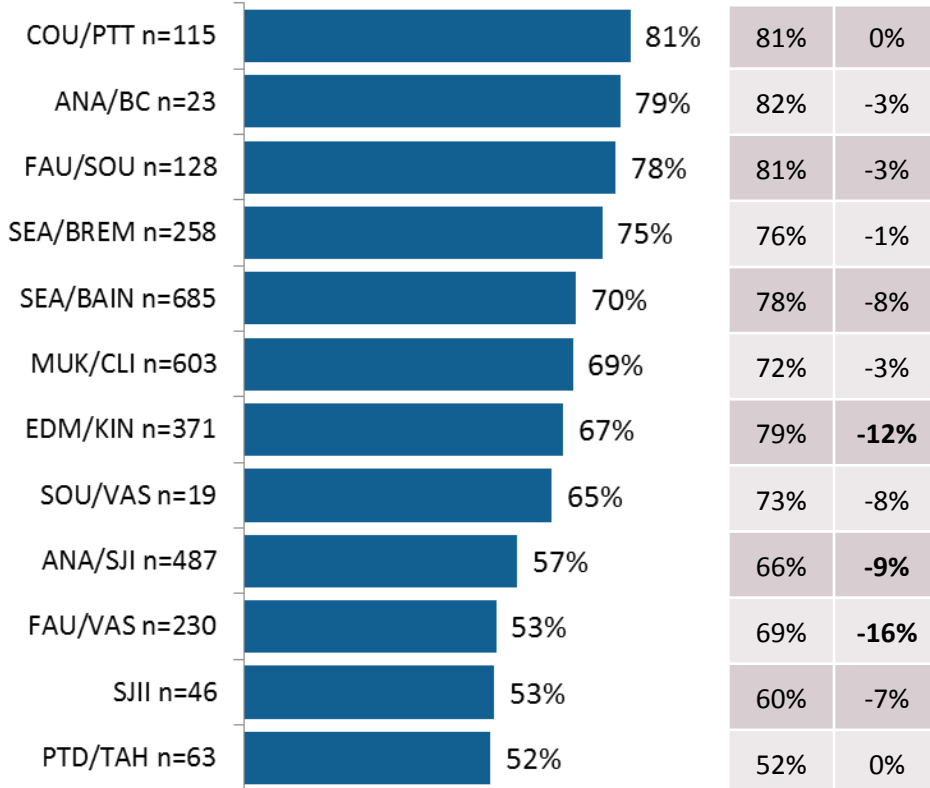
■ Very poor value ■ poor value ■ good value ■ Very good value



Only ratings of good or poor are shown, don't know responses are not shown.
The **bold** percentages represents the corresponding total good/poor value

Overall 'Good Value' by Route

(Very good + good value)



Q26. For the Summer period (June 15th through September 20th), do you feel that Washington State Ferries is...

Satisfaction by Attribute - Tracking

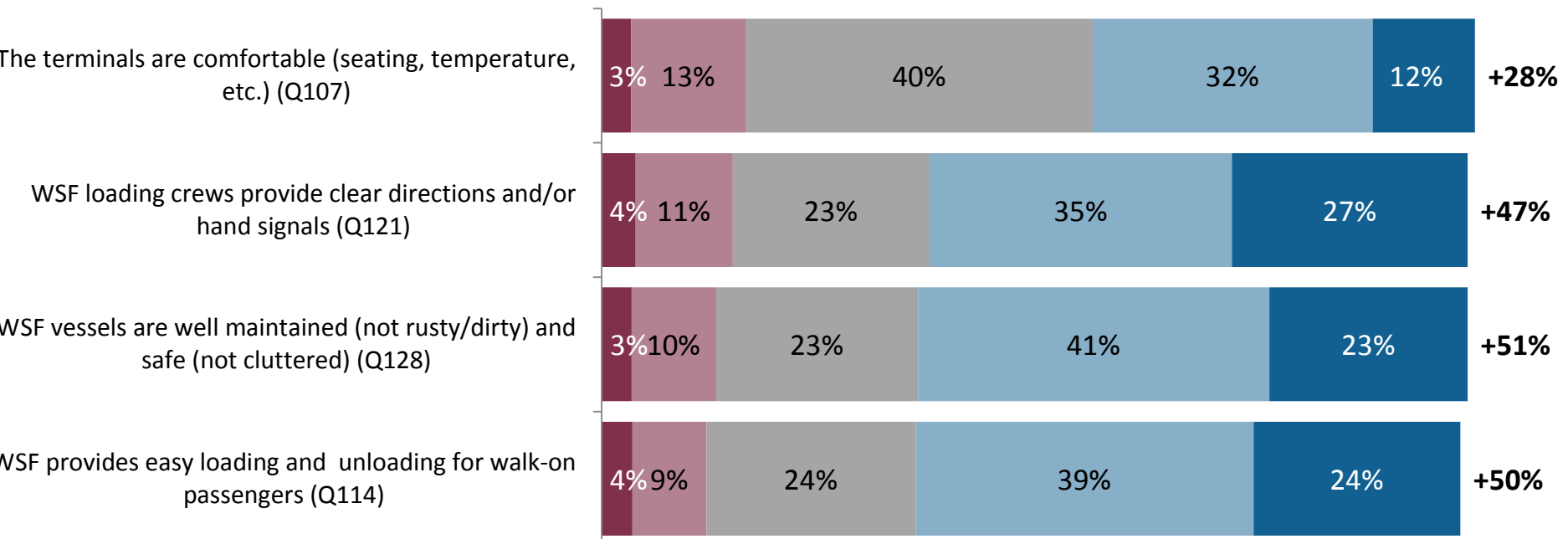


Satisfaction across all four attributes remains positive. Total dissatisfaction has only slightly increased since 2012.

- ❖ The following table present an overview of the following slides containing the quad chart analysis
- ❖ The following table shows the total dissatisfaction (1-2) of each individual attribute, relative to the 2012 dissatisfaction.
 - The **Shift** is 2014 dissatisfaction minus 2012 dissatisfaction

Attributes	Summer Total Dissatisfaction		
	2014	2012	Shift
Terminals are comfortable	16%	15%	+2%
WSF provides easy loading and unloading for walk-ons	13%	11%	+1%
WSF loading crews provide clear directions and/or hand signals	15%	11%	+4%
WSF Vessels are well maintained and safe	13%	9%	+4%

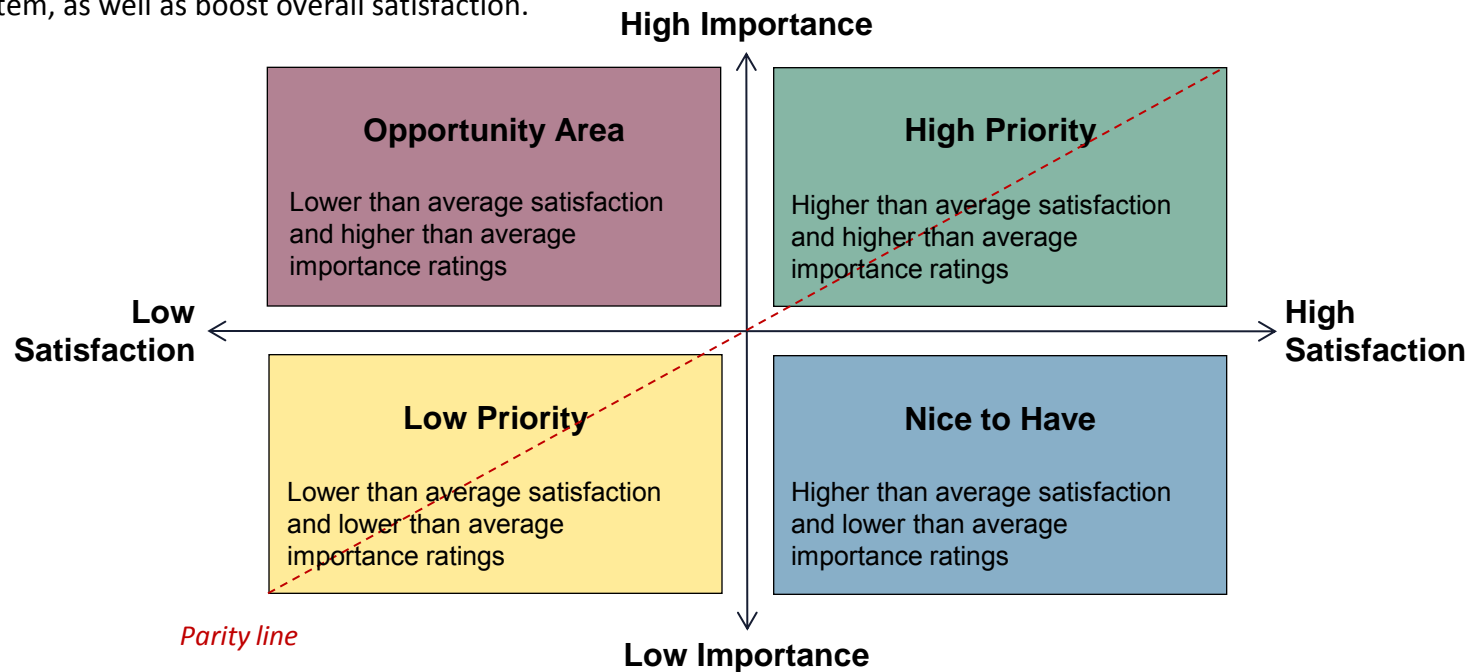
■ 1 - Dissatisfied ■ 2 ■ 3 ■ 4 ■ 5 - Satisfied **Net Satisfaction**



Gap Analysis



- ❖ The following slides present quadrant charts outlining the relative importance of each ferry attribute and the relative satisfaction of each attribute.
 - The two sample sizes shown on each chart represent the maximum and minimum number of riders rating any given attribute, due to embedded skip logic.
- ❖ Each quad chart consists of four quadrants:
 - Opportunity area (red) | High priority (green) | Nice to have (blue) | Low priority (yellow)
- ❖ Each quad chart is also overlaid with a parity line.
 - The parity line represents where importance and satisfaction is equal, and identifies the ferry attributes with the greatest disparity between satisfaction and importance.
- ❖ Attributes considered highly important, but with low satisfaction (performance), indicate opportunity areas for improvement by WSF. Increasing awareness of these important attributes may help promote more positive impressions of the ferry system, as well as boost overall satisfaction.

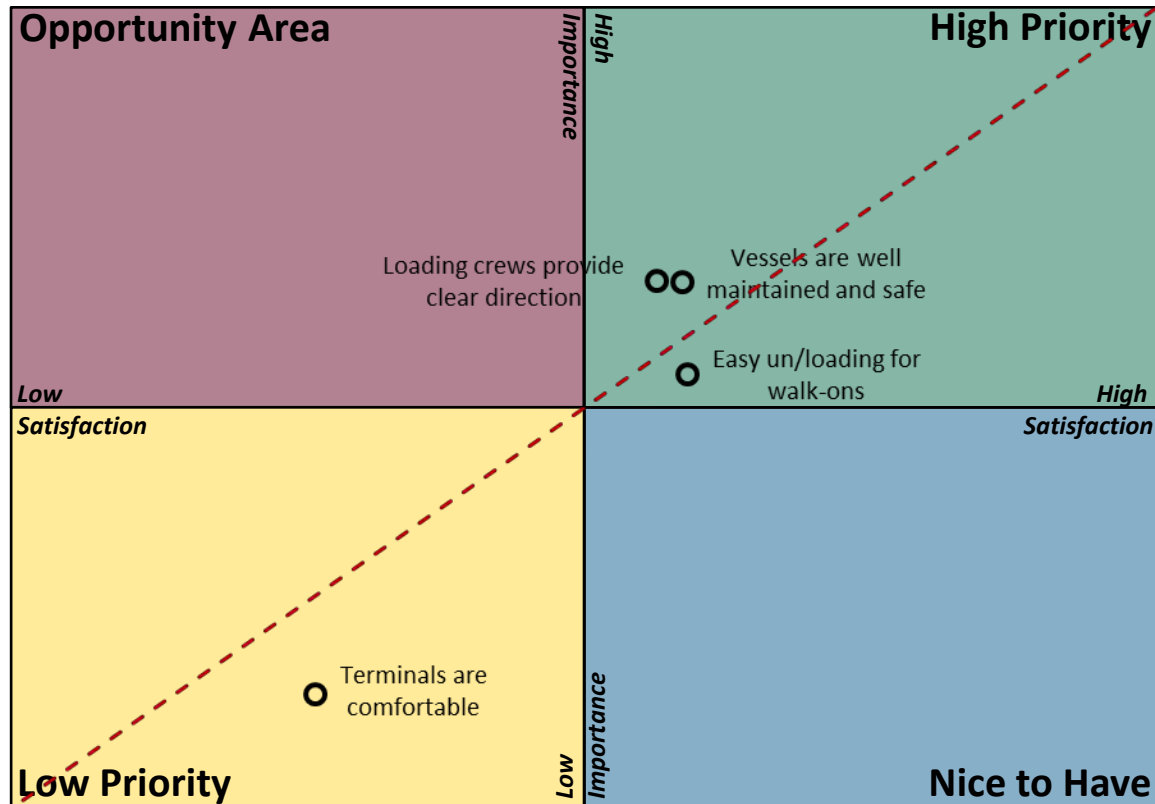


Gap Analysis: Overall



While there are no opportunity areas overall, Loading crews providing clear directions, and vessels are well maintained and safe are the two highest priority attributes

Satisfaction vs. Importance Ratings (n=1,986 - 2,815)

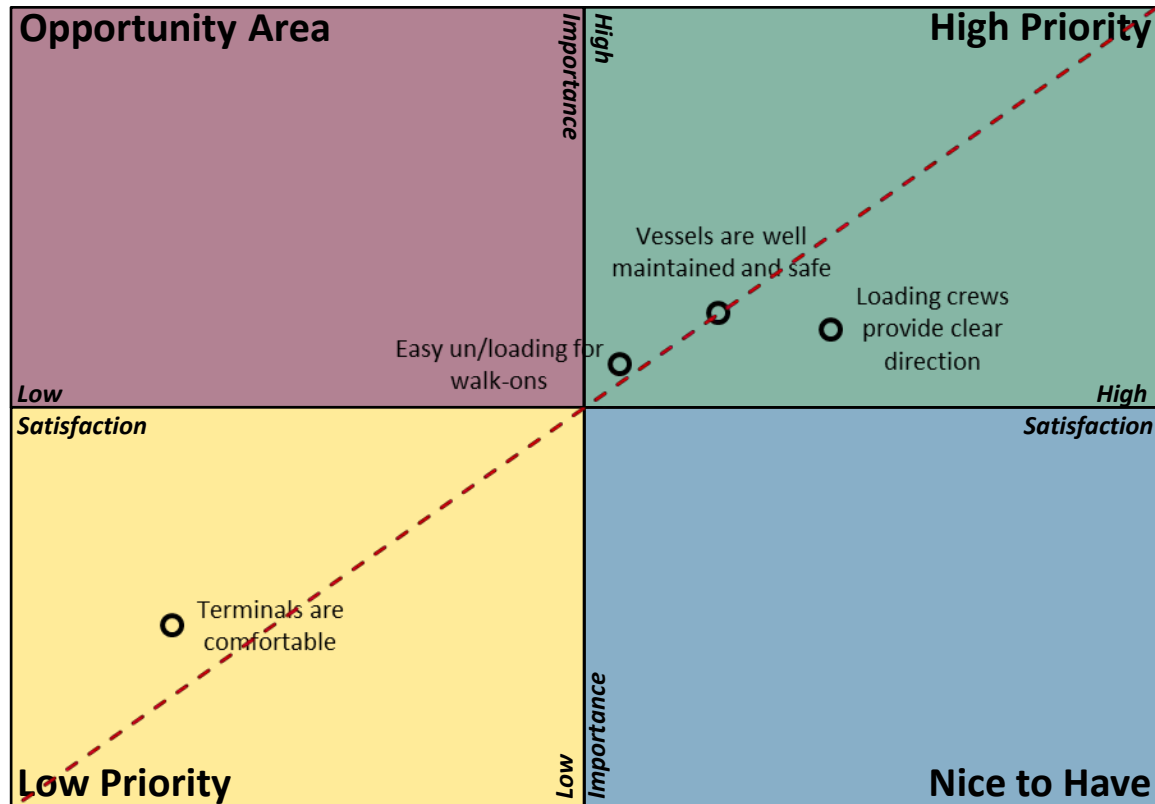


Gap Analysis: Seattle/ Bainbridge



Among Seattle/ Bainbridge riders, Easy loading and unloading for walk-on's and terminal comfort are the greatest area for improvement. However, all attributes remain in positive categories.

Satisfaction vs. Importance Ratings (n=576 - 669)

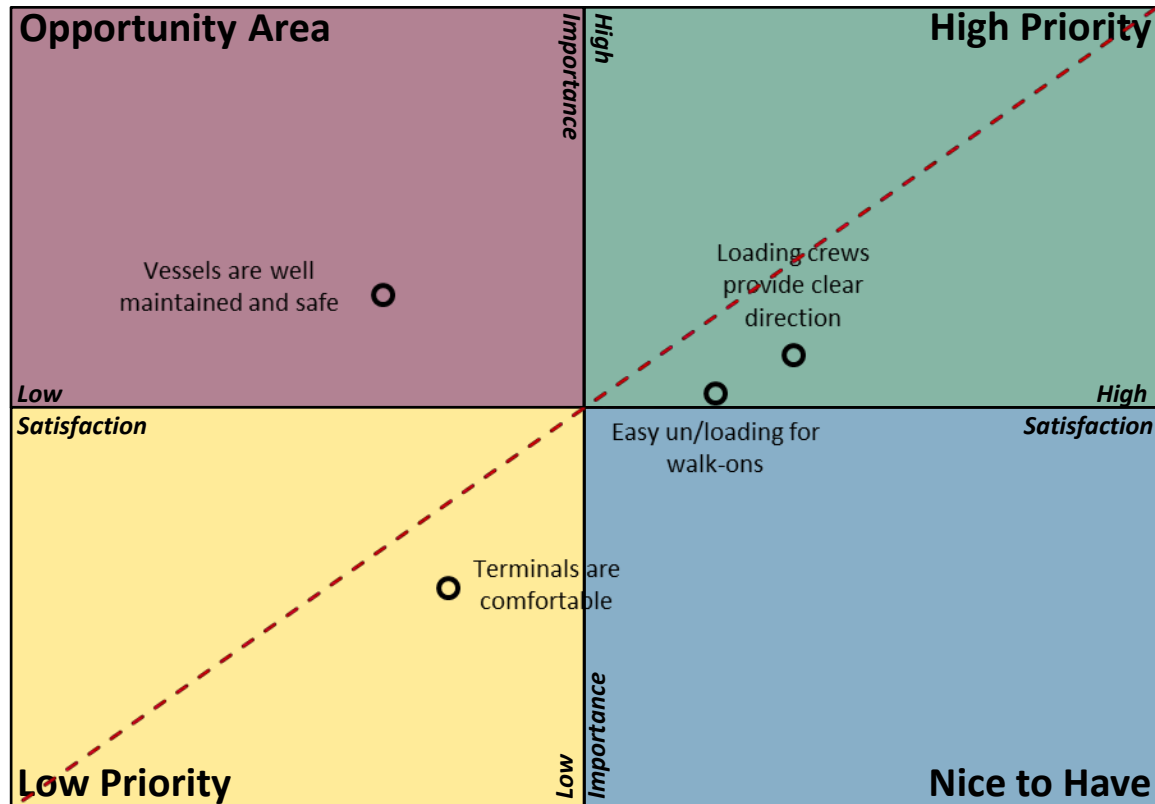


Gap Analysis: Seattle/ Bremerton



Among Seattle/ Bremerton riders, Vessels are well maintained and safe is the greatest opportunity area.

Satisfaction vs. Importance Ratings ($n=196 - 248$)

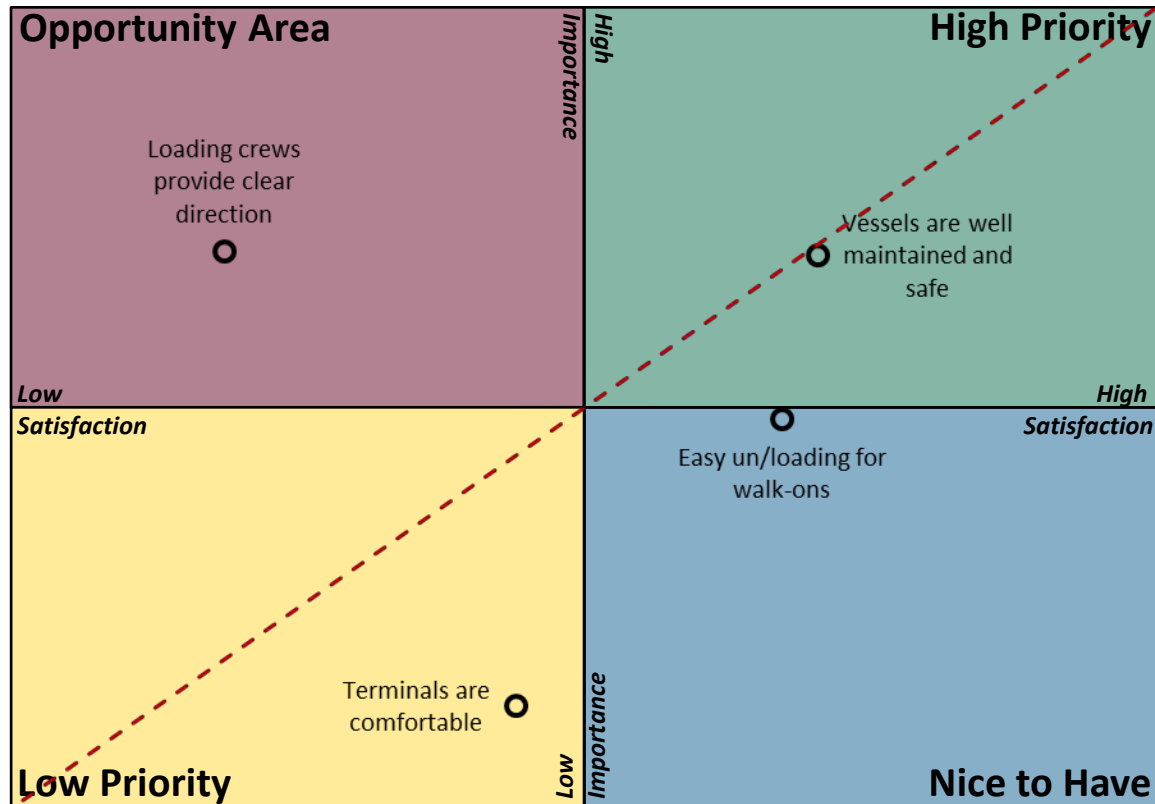


Gap Analysis: Point Defiance/ Tahlequah



Loading crews providing clear directions is the greatest opportunity area for Point defiance/Tahlequah riders

Satisfaction vs. Importance Ratings (n=35 - 61)

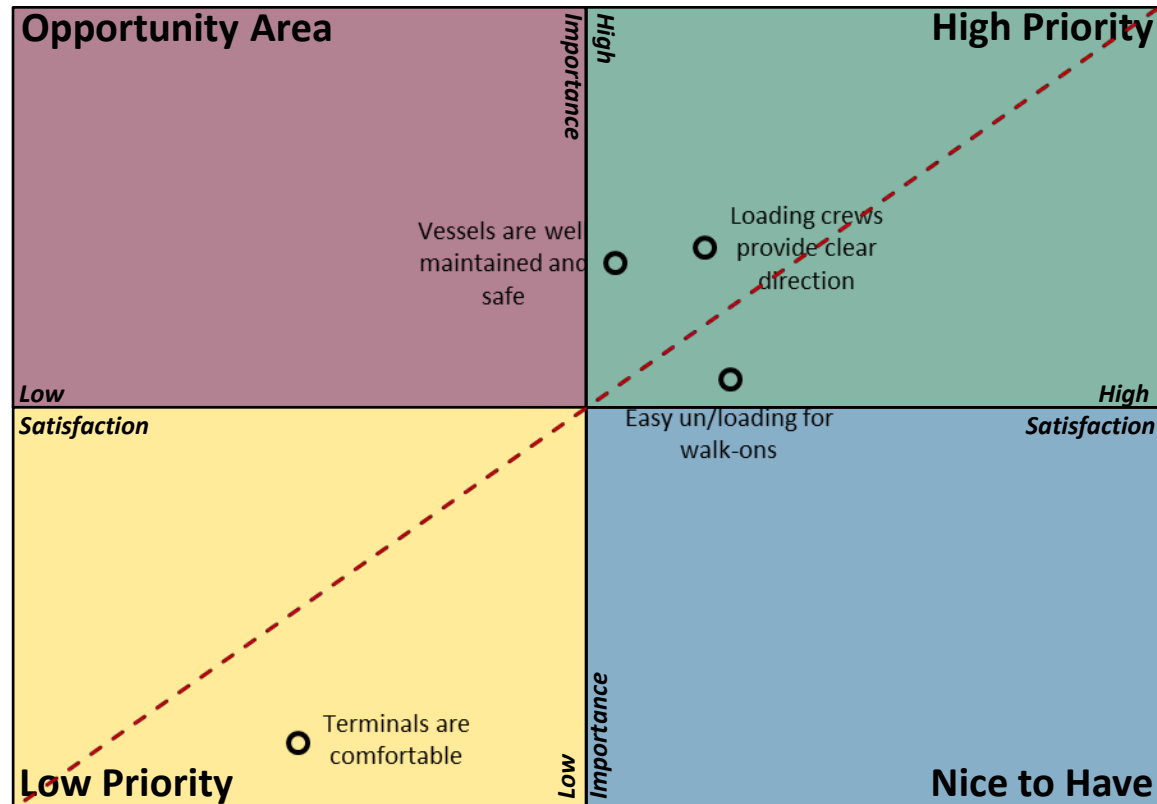


Gap Analysis: Edmonds/ Kingston



Vessels are well maintained and safe is a priority, but not an opportunity area. all attributes remain in positive quadrants

Satisfaction vs. Importance Ratings (n=228 - 352)

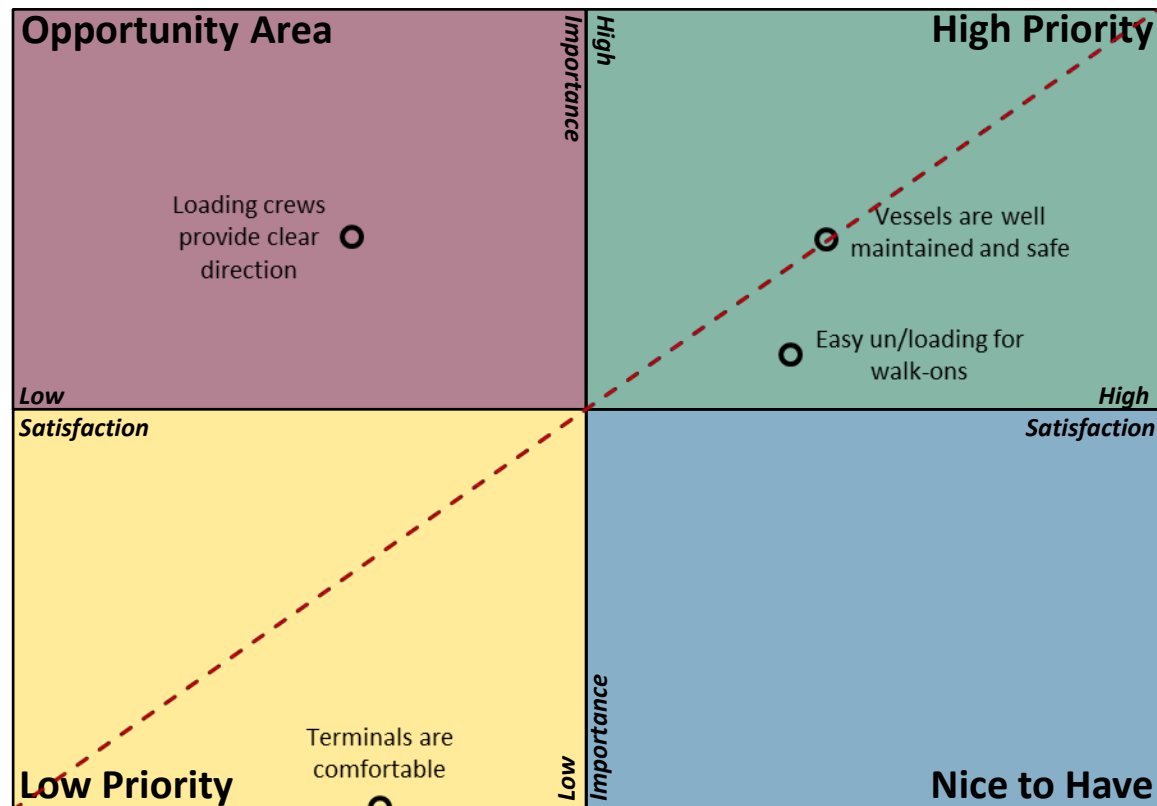


Gap Analysis: Fauntleroy/ Vashon



Loading crews providing clear directions is the top opportunity area for Fauntleroy/Vashon riders.

Satisfaction vs. Importance Ratings (n=150 - 227)

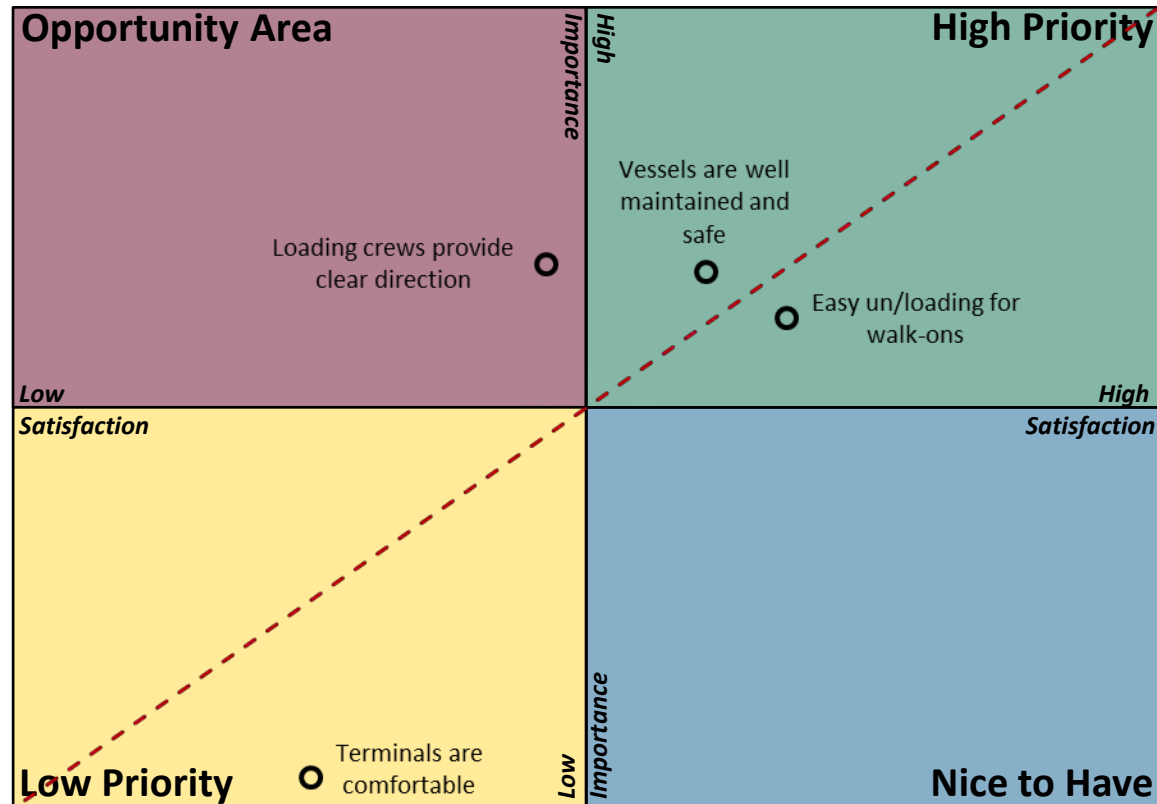


Gap Analysis: Fauntleroy/ Southworth



For Fauntleroy/Southworth riders, loading crews providing clear directions is the top opportunity area.

Satisfaction vs. Importance Ratings (n=66 - 119)

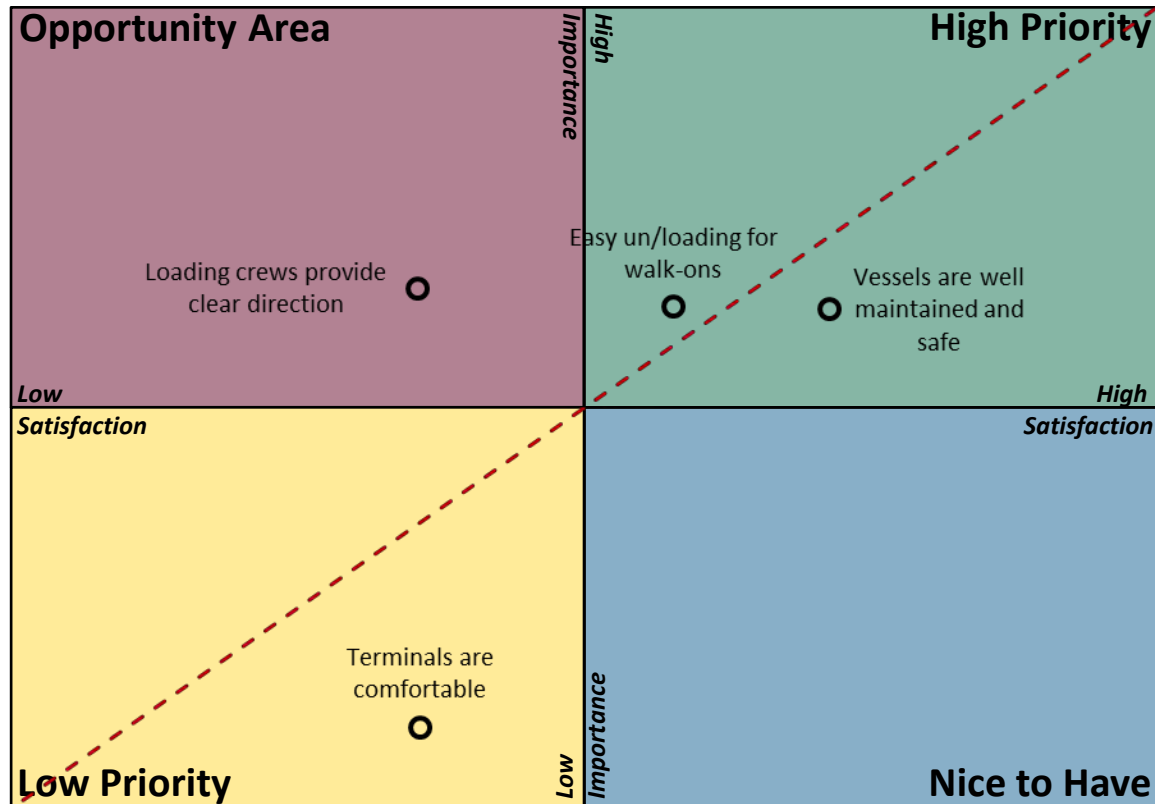


Gap Analysis: Southworth/ Vashon



Southworth/Vashon riders top opportunity area is loading crews provide clear directions

Satisfaction vs. Importance Ratings (n=13 - 17)

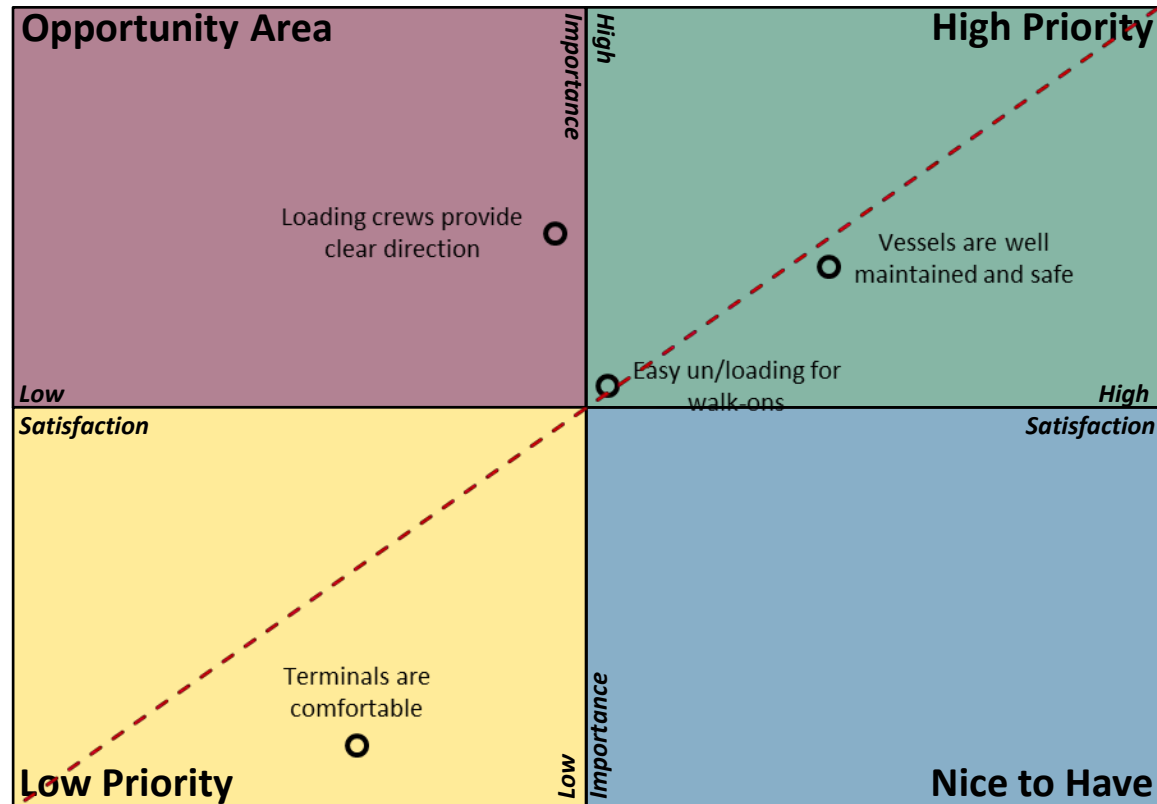


Gap Analysis: Coupeville/ Port Townsend



Loading crews providing clear directions is the top opportunity area for Coupeville/Pt. Townsend riders.

Satisfaction vs. Importance Ratings (n=60 - 113)

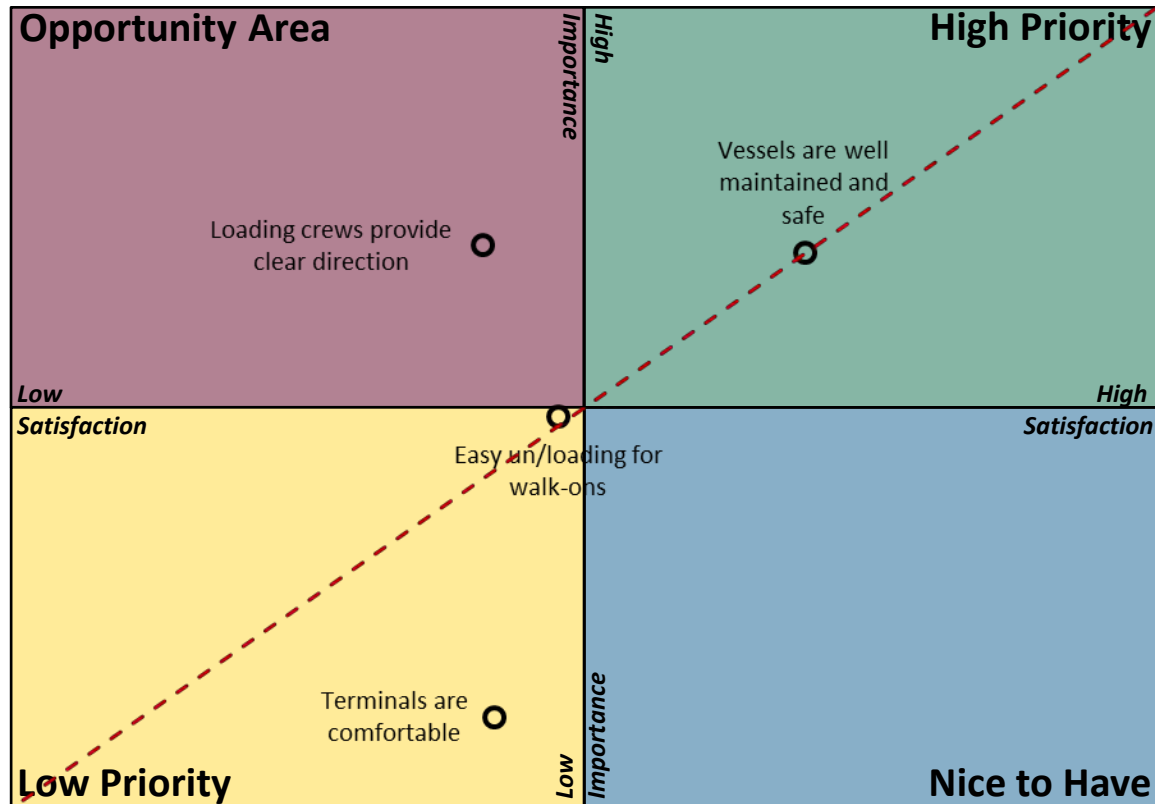


Gap Analysis: Mukilteo/ Clinton



For Mukilteo/Clinton riders, loading crews providing clear directions is the number one opportunity area

Satisfaction vs. Importance Ratings (n=371 - 591)

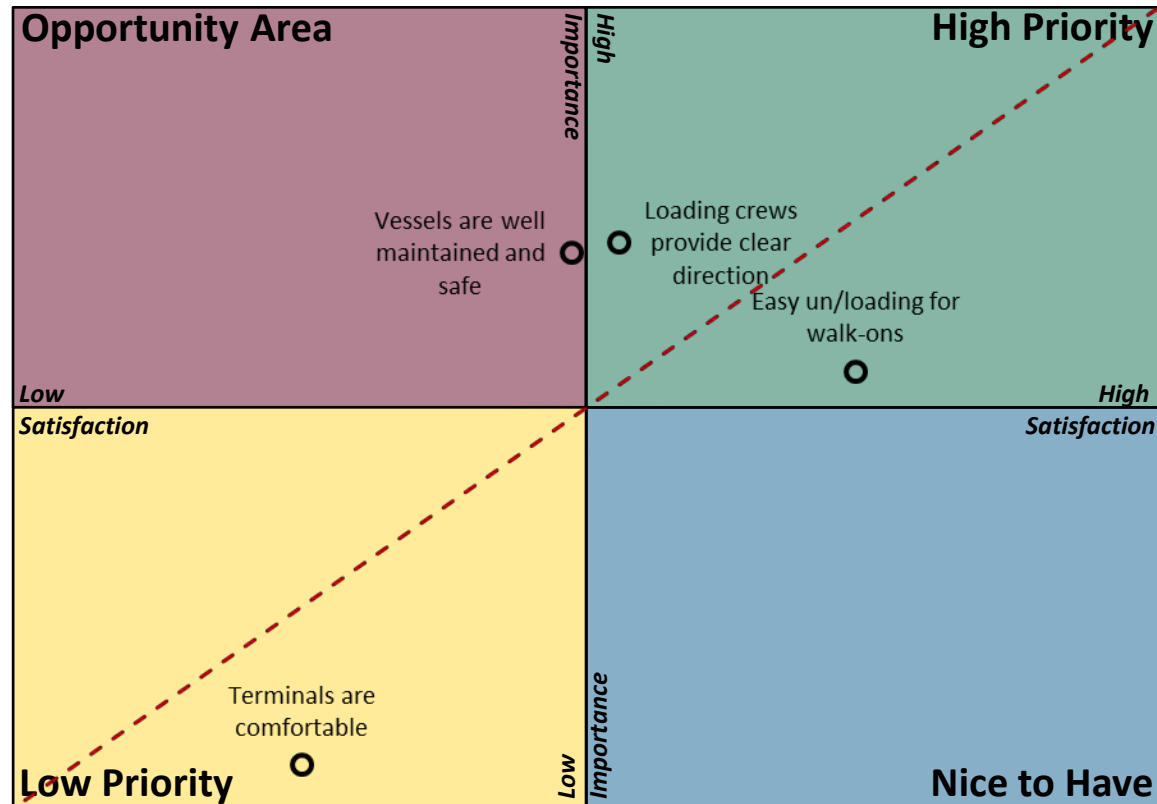


Gap Analysis: Anacortes/ San Juan Islands



Vessels that are well maintained and safe stand out as the main opportunity area for Anacortes/ San Juan Islander riders

Satisfaction vs. Importance Ratings (n=230 - 470)

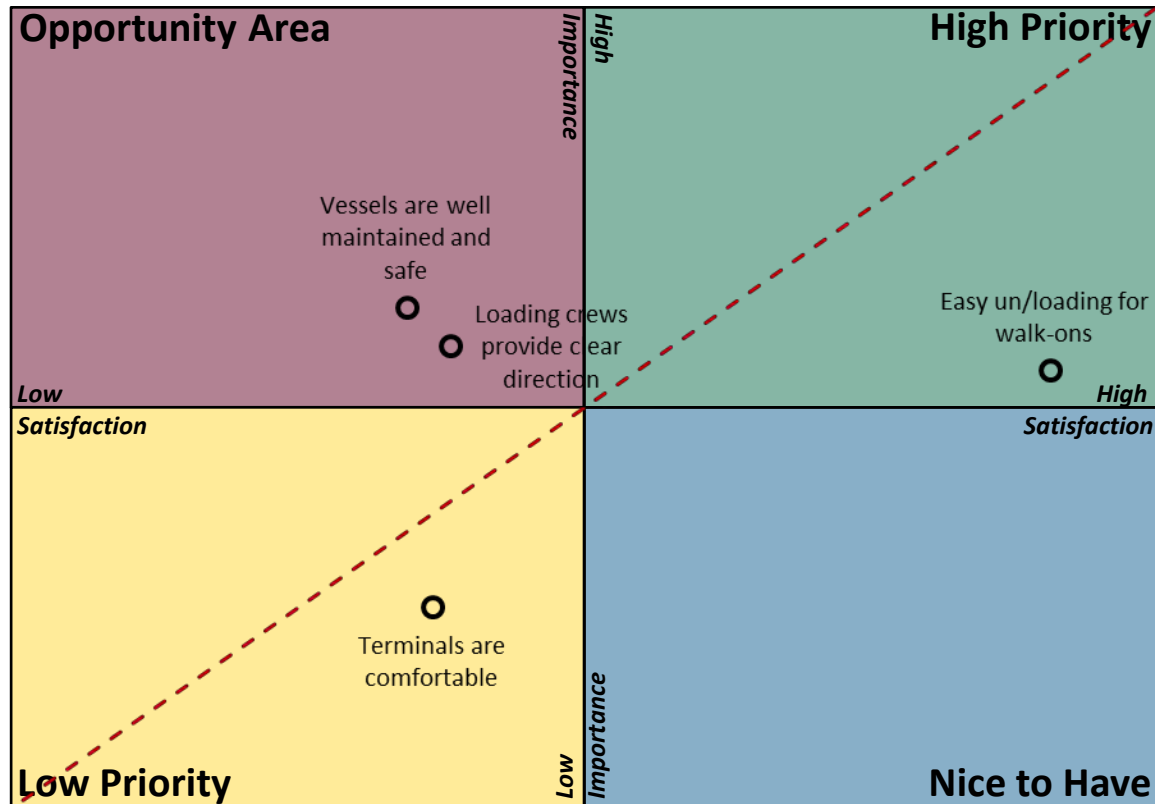


Gap Analysis: San Juan Interisland



Among San Juan Interisland riders, keeping vessels well maintained and safe along with loading crews providing clear directions are the two opportunity areas.

Satisfaction vs. Importance Ratings (n=33 - 43)

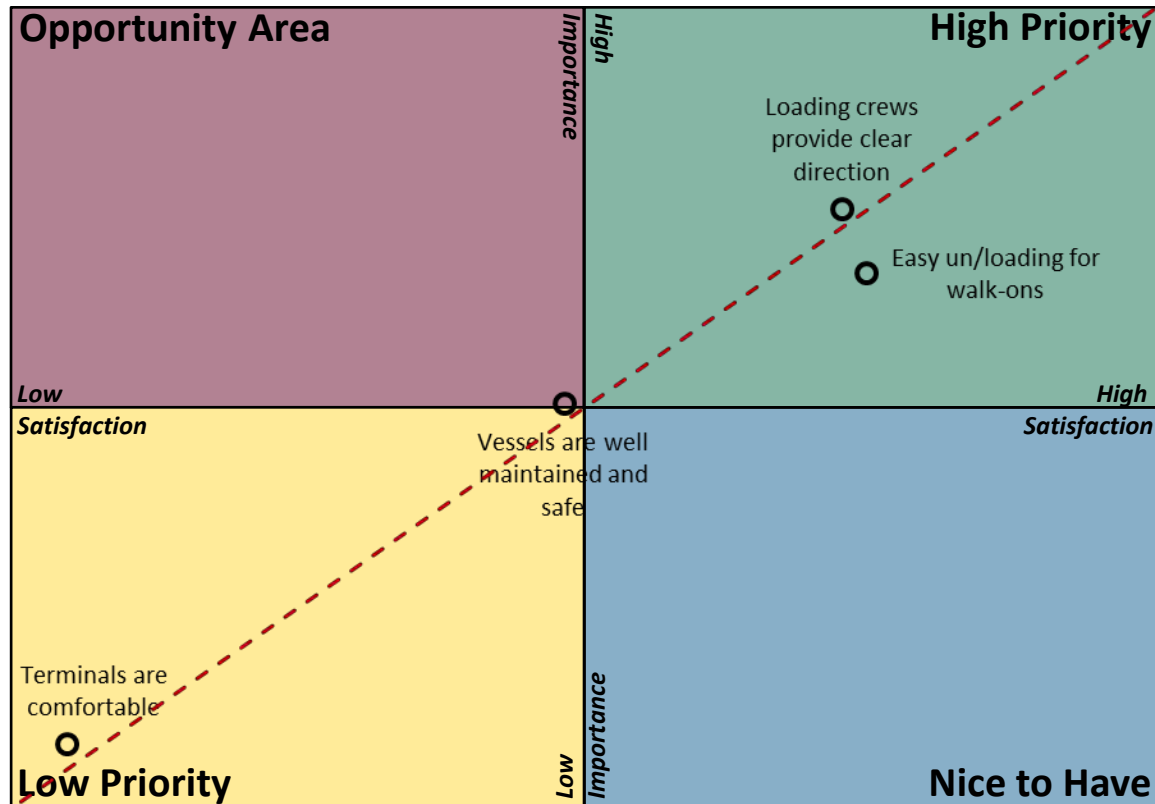


Gap Analysis: Anacortes/ Sidney B.C.



Vessels are well maintained and safe is just barely an area for opportunity among Anacortes/ Sidney BC riders

Satisfaction vs. Importance Ratings (n=10 - 23)



Attribute Ratings by Route



- ❖ The proceeding slides present an overview of each Ferry attribute individually and include the following:
 - The percentage providing top ratings (5 + 4) on a 5-point scale for importance and satisfaction for each of the ferry attributes, by route.
 - The percentage providing bottom ratings (1 + 2) on a 5-point scale for satisfaction for each of the ferry attributes, by route.
 - Randomly selected verbatim responses specify what made riders dissatisfied
 - 2012 Summer Ferry Comparison data for bottom ratings (1 + 2) on a 5-point scale for satisfaction for each of the ferry attributes, by route.

Terminals are comfortable



Dissatisfaction of terminals comfortable is highest among Seattle/Bainbridge Routes and Anacortes SJI and interisland SJI.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		2,213	589	214	35	235	176	93	16	86	386	330	33	20
Terminals are comfortable (2014)	Imp. (4-5)	61%	71%	72%	61%	55%	49%	55%	62%	55%	58%	52%	69%	44%
	Sat. (4-5)	44%	33%	50%	64%	50%	47%	45%	60%	59%	58%	32%	42%	25%
	Dissat. (1-2)	17%	23%	18%	3%	13%	11%	14%	0%	10%	10%	26%	27%	3%
2012	Dissat. (1-2)	15%	22%	13%	7%	9%	15%	0%	0%	2%	11%	22%	0%	0%

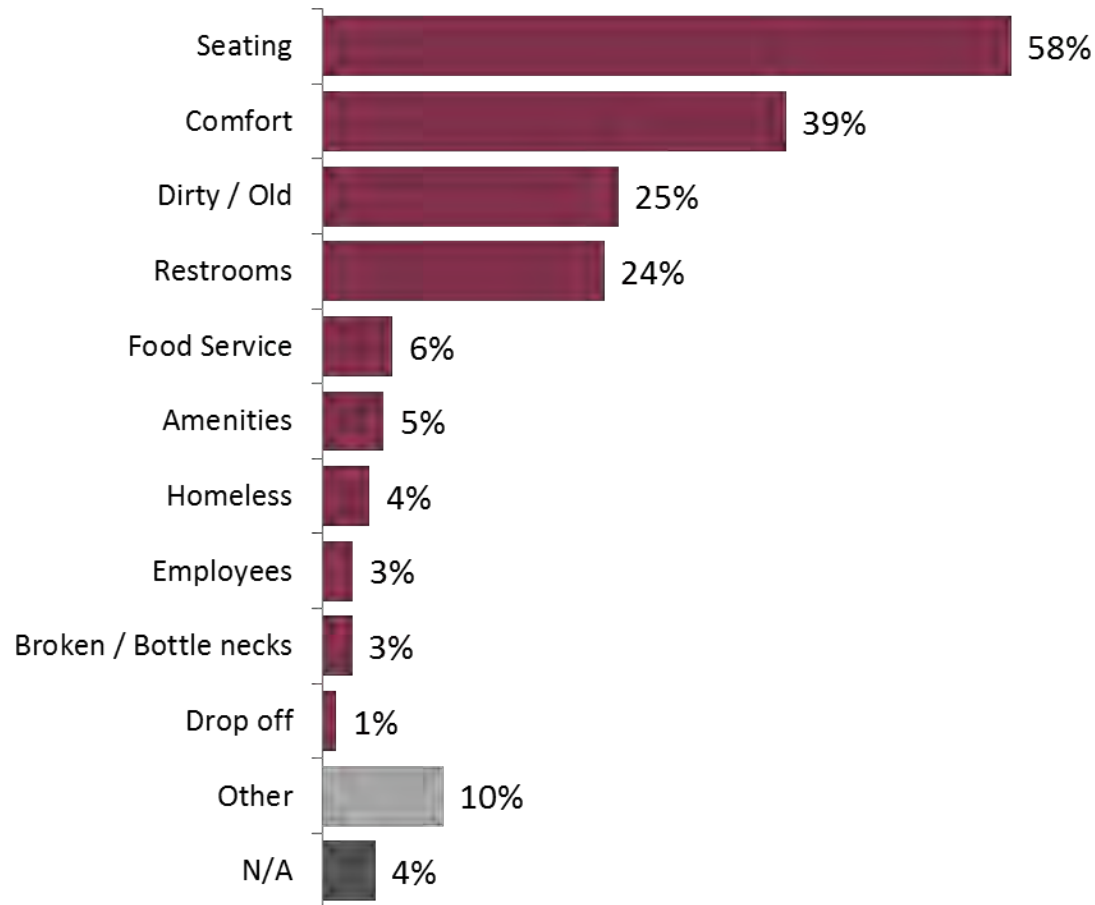
Top 3 Unsatisfactory Terminals	
Seattle	54%
Bainbridge	33%
Anacortes	17%

Example of Verbatim Complaints
Seattle - Chairs/seats are uncomfortable, need upgrading
Seattle - Homeless people often wander in and beg for money, no outlets for charging phones/laptops, tables are small and have limited seating.
Seattle - Seats not comfortable for waiting
Seattle - restrooms in very poor condition, otherwise reasonably good.
Bainbridge - was undergoing construction, basically it was chaos. No AC, restrooms were a pit, no place to sit, the whole thing was bad.
Bainbridge - under construction
Bainbridge - Poor lighting. No great seating. Have to stand in the cold breezeway
Anacortes - It doesn't seem that the terminals have been updated in decades, or if they have they haven't taken customer comfort into much consideration... airports are much nicer these days, why not the ferry terminals?

Terminal Issues Mentioned



Seating is the top complaint among people who are dissatisfied.



Q42b. What specific conditions (about the terminal) made you dissatisfied (n=359)

WSF provides easy loading and unloading for walk-ons



Dissatisfaction is highest for Seattle Bainbridge and Mukilteo Clinton

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		1986	576	208	40	228	150	66	13	60	371	230	34	10
WSF provides easy loading and unloading for walk-ons (2014)	Imp. (4-5)	85%	90%	87%	83%	82%	84%	89%	93%	82%	81%	81%	87%	91%
	Sat. (4-5)	64%	57%	64%	78%	72%	69%	70%	73%	72%	62%	62%	75%	81%
	Dissat. (1-2)	12%	16%	14%	5%	5%	8%	8%	9%	5%	15%	10%	12%	5%
2012	Dissat. (1-2)	11%	15%	5%	0%	6%	12%	0%	0%	3%	14%	11%	0%	0%

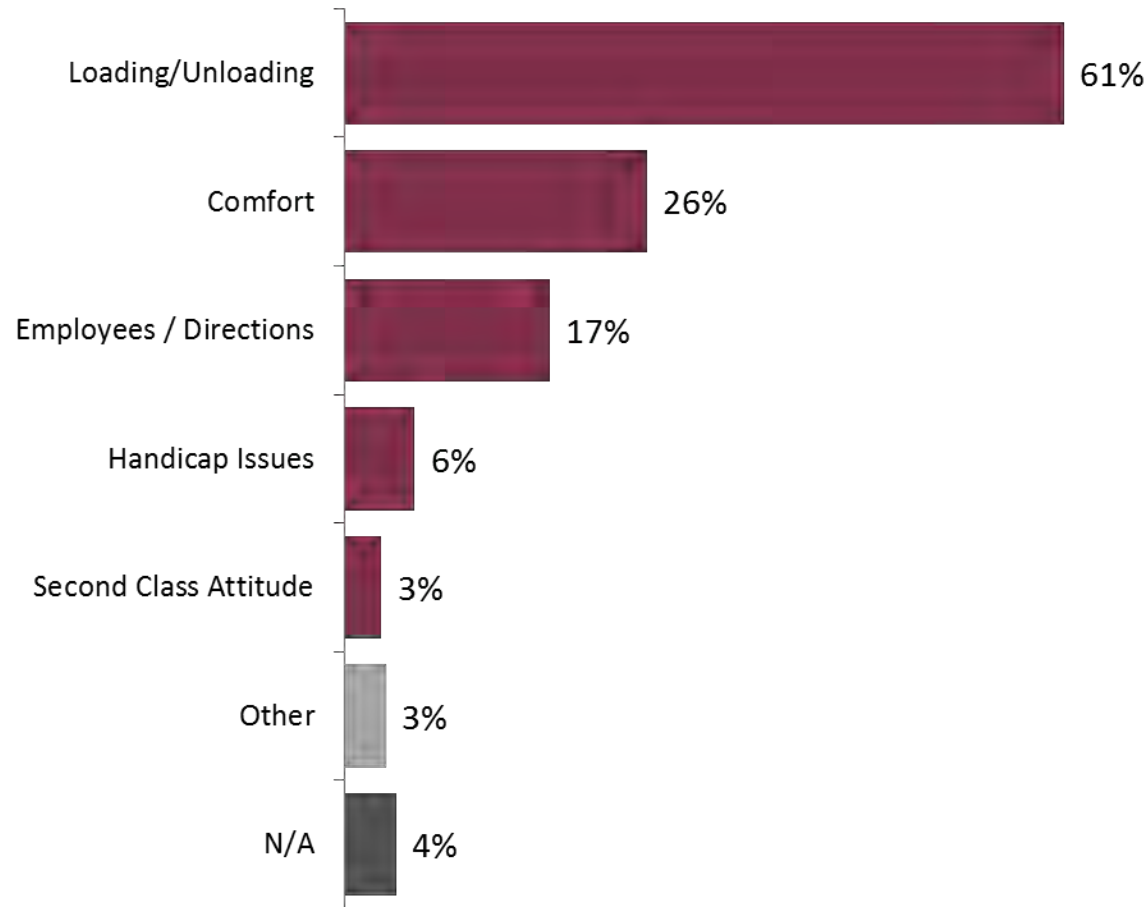
Top 3 Unsatisfactory Terminals	
Seattle	45%
Bainbridge	33%
Mukilteo	18%

Example of Verbatim Complaints
Seattle - Especially during the summer, there are numerous vacationers who are oblivious to the fact that the ferry is also a commuter route. They fail to move all the way to the front where the turnstiles are, so the crowd extends well back into the terminal.
Seattle - Inefficient loading and unloading of walk-ons. Last to get off-loaded after bikes, motorbikes and about half the cars. Ramp is too small for volume of passengers. Too slow to connect and too narrow for crowds.
Seattle - terminal has too little room for waiting passengers. too crowded.
Bainbridge - The walkway is too narrow and long and does not allow for efficient boarding and unloading.
Bainbridge - The exit ramp is very narrow and not many people can exit the ferry at one time. This makes it difficult to catch the early 90 buses to Poulsbo unless you stand near the walk-on exit for a good part of the ferry ride.
Bainbridge - Longest configuration possible make it a very long walk
Mukilteo - too small, too crowded, only 2 ticket turnstiles, no protection from weather,
Mukilteo - When I walk on with a dog I have to stay down on the car deck where it is cold and windy

Walk on Issues Mentioned



The loading and unloading of walk on passengers is the top complaint among people who are dissatisfied.



Q46c. What specific (walk on) conditions made you dissatisfied (n=238)

WSF loading crews provide clear directions / hand signals



Dissatisfaction with WSF loading crews provide clear directions is highest in Port Townsend, Fauntleroy/Vashon, Anacortes/SJI and Interisland.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		2819	616	196	61	347	227	119	17	109	591	470	43	23
WSF loading crews provide clear directions/ hand signals (2014)	Imp. (4-5)	92%	93%	90%	95%	92%	93%	93%	95%	94%	94%	91%	89%	97%
	Sat. (4-5)	62%	68%	68%	48%	71%	46%	58%	60%	69%	58%	49%	43%	80%
	Dissat. (1-2)	15%	11%	10%	23%	12%	26%	21%	18%	9%	16%	24%	27%	3%
2012	Dissat. (1-2)	11%	7%	14%	19%	9%	14%	0%	0%	5%	14%	16%	0%	0%

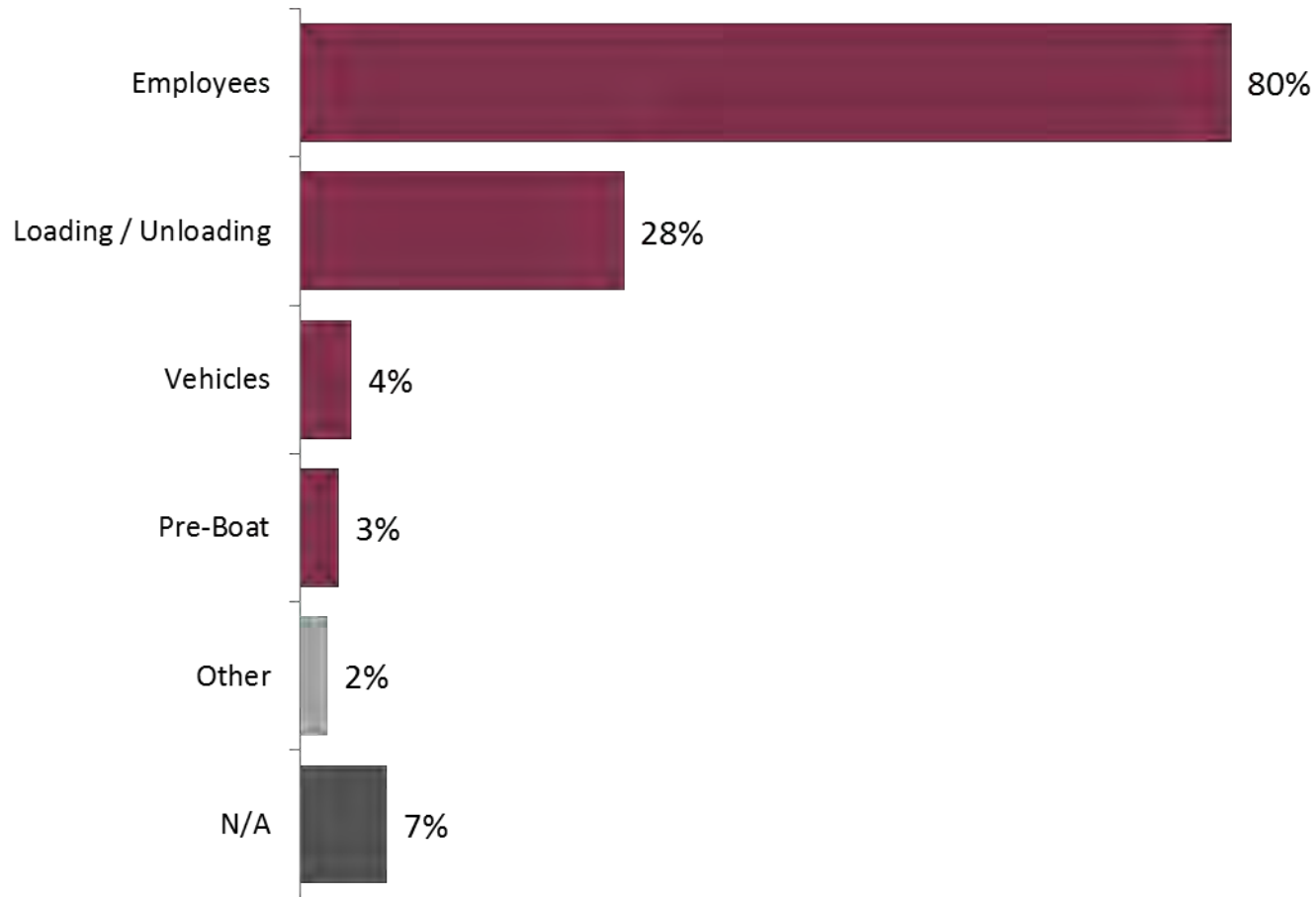
Top 3 Unsatisfactory Terminals	
Seattle	22%
Fauntleroy	19%
Bainbridge	16%

Example of Verbatim Complaints
Seattle - When loading in the AM some of the newer crew members that are responsible for motorcycle placement will often fail to make the appropriate signals or gestures to the on coming riders.
Seattle - Some deckhands give clear direction and some appear more to be shrugging than signaling. Sometimes I have to ask my wife which direction she thinks is being indicated.
Seattle - confusing hand signals, occasionally poor eye contact
Fauntleroy - vague or ambiguous signals about stopping and proceeding
Fauntleroy - workers on the boat were not paying attention, yelled at people who could not understand their cryptic hand gestures. making the boat very slow to load.
Bainbridge - The boarding process seems to never even itself out. I'm never sure why we are placed on the upper level side versus the middle. I may be earlier in line but rarely off the boat anywhere but towards the latter
Bainbridge - Inconsistent loading/unloading practice. Not making effort to load as many vehicles as possible.

Vehicle Loading Issues Mentioned



The Employees giving hand signals are the top complaint among people who are dissatisfied.



Q51d. What specific (vehicle loading) conditions made you dissatisfied (n=423)

WSF Vessels are well maintained and safe



Dissatisfaction with WSF vessels well maintained and safe is highest in Seattle/Bainbridge, Anacortes/SJI, Interisland, and Anacortes/BC.

Ratings on a 5 point scale (1=low, 5=high)		TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents		2895	669	248	57	352	216	119	17	113	561	477	43	23
WSF Vessels are well maintained and safe (2014)	Imp. (4-5)	92%	94%	94%	95%	91%	92%	93%	93%	91%	93%	90%	92%	78%
	Sat. (4-5)	63%	62%	46%	80%	66%	71%	66%	81%	84%	75%	47%	41%	60%
	Dissat. (1-2)	13%	14%	23%	5%	8%	8%	14%	7%	6%	6%	24%	31%	34%
2012	Dissat. (1-2)	9%	9%	22%	2%	6%	4%	0%	0%	0%	5%	16%	0%	0%

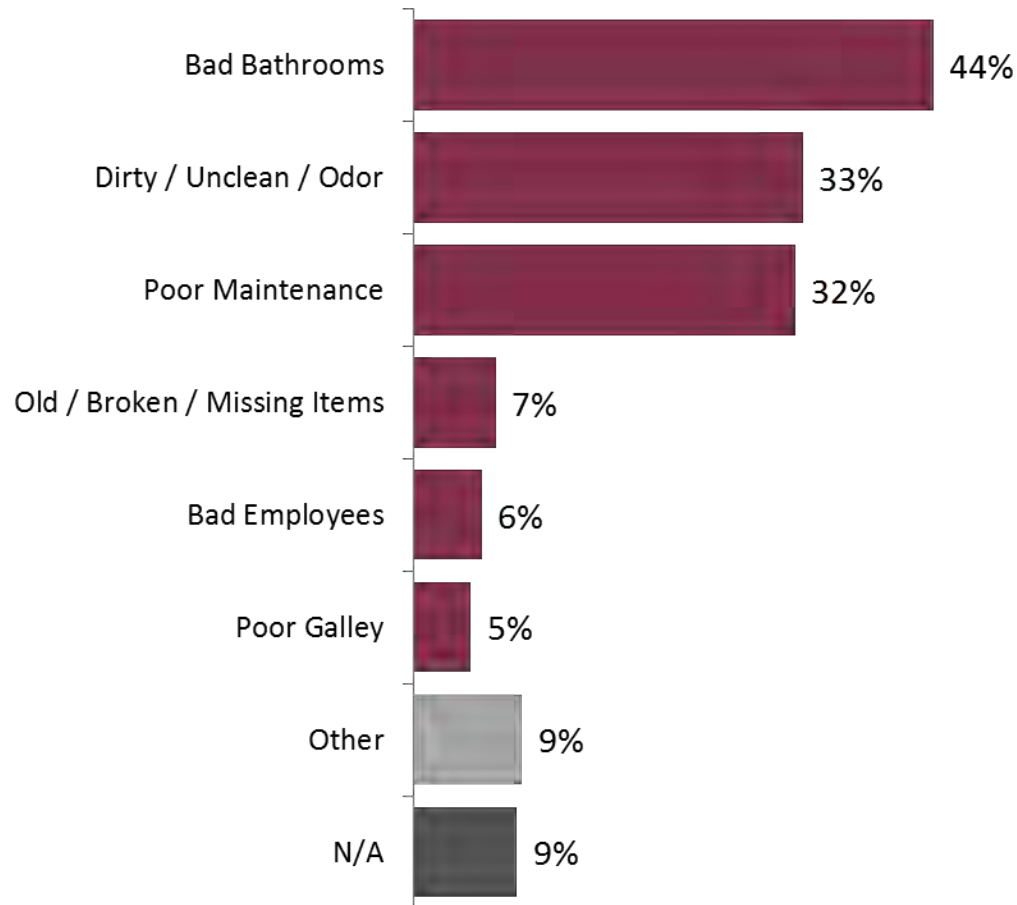
Top 4 Unsatisfactory Vessels	
Don't recall name	35%
Wenatchee	15%
Cathlamet	14%
Puyallup	13%

Example of Verbatim Complaints
Wenatchee - Rest rooms always stink. The smell comes outside into the seating areas because the doors are always left open. Constant loud sounds of toilets flushing is disconcerting. Seating areas are not well maintained
Wenatchee - Restrooms need to be remodeled they are in very bad shape
Wenatchee - Seats are filthy, food stuck in creases, floors are very dirty, accessible bathroom smells of urine with nasty toilet brush lying in the corner.
Wenatchee - Even when the bathrooms are 'clean', they are dirty. Where the floor and wall meet I don't believe ever gets mopped or washed
Cathlamet - The bathrooms were not clean and tables on each boat are dirty. It is a common sight to see passengers pull out our wipes ourselves to clean the table-top surface and/or benches.
Cathlamet - Seating areas and restrooms are filthy.
Cathlamet - The seats, tables and bathrooms are often dirty. Staff are near invisible. Passengers are allowed to put thier feet on seats, tables and even the windows with no consequence.
Puyallup - Overall the boats are in poor condition - paint and deck coating

Vessel Issues Mentioned



The Bathrooms are the top complaint among people who are dissatisfied.



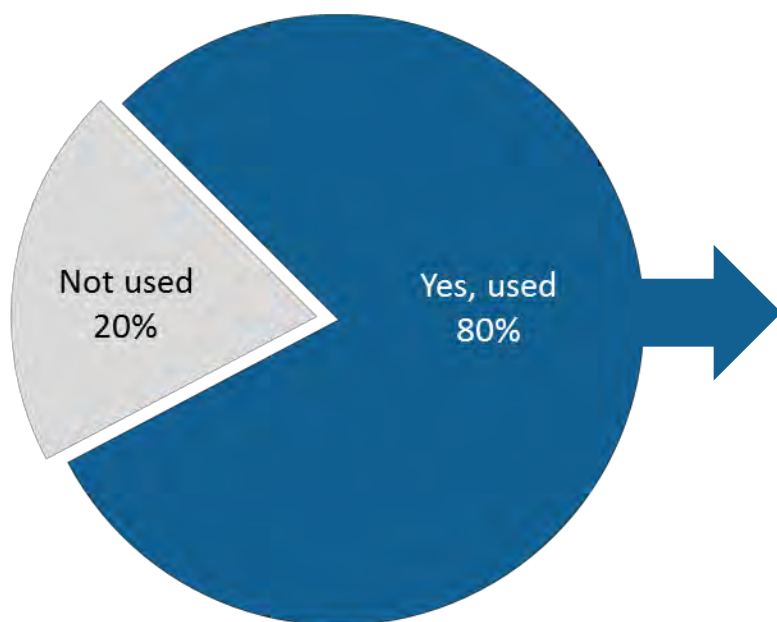
Q59c. What specific (vessel) conditions made you dissatisfied (n=361)

Using WSF Website

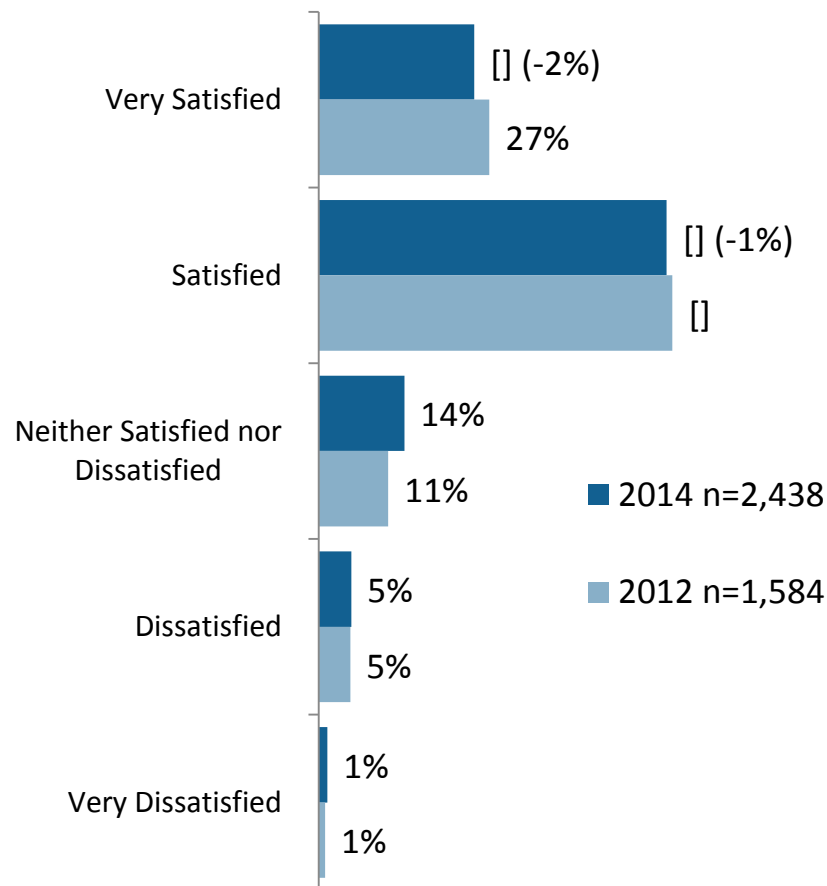


More than three quarters of summer respondents have used the WSF website for some reason and almost all say they are satisfied with their experience.

Used WSF Website
n=3,022



Experience Using Website



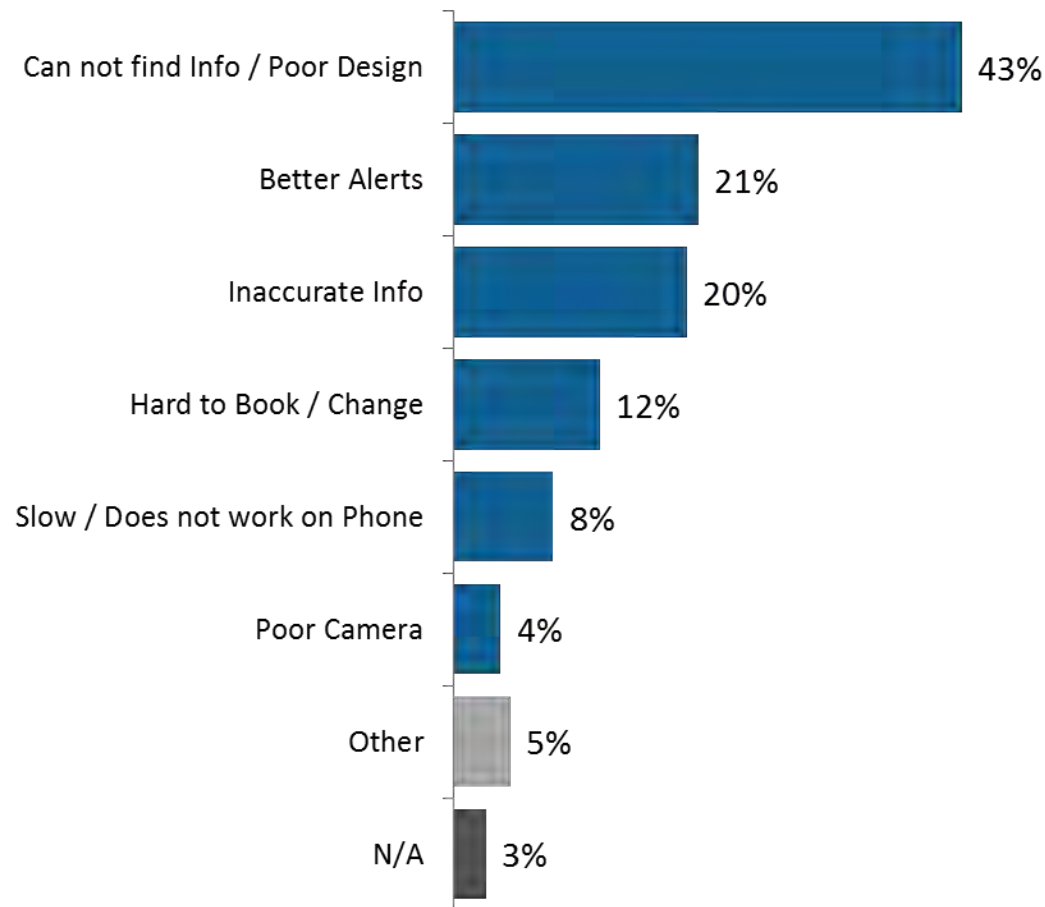
Q65. have you for any reason used the WSF website?

Q66. How satisfied were you with your experience using the WSF website?

Website Issues Mentioned



The ability to find information and for that information to be accurate where the most mentioned issues

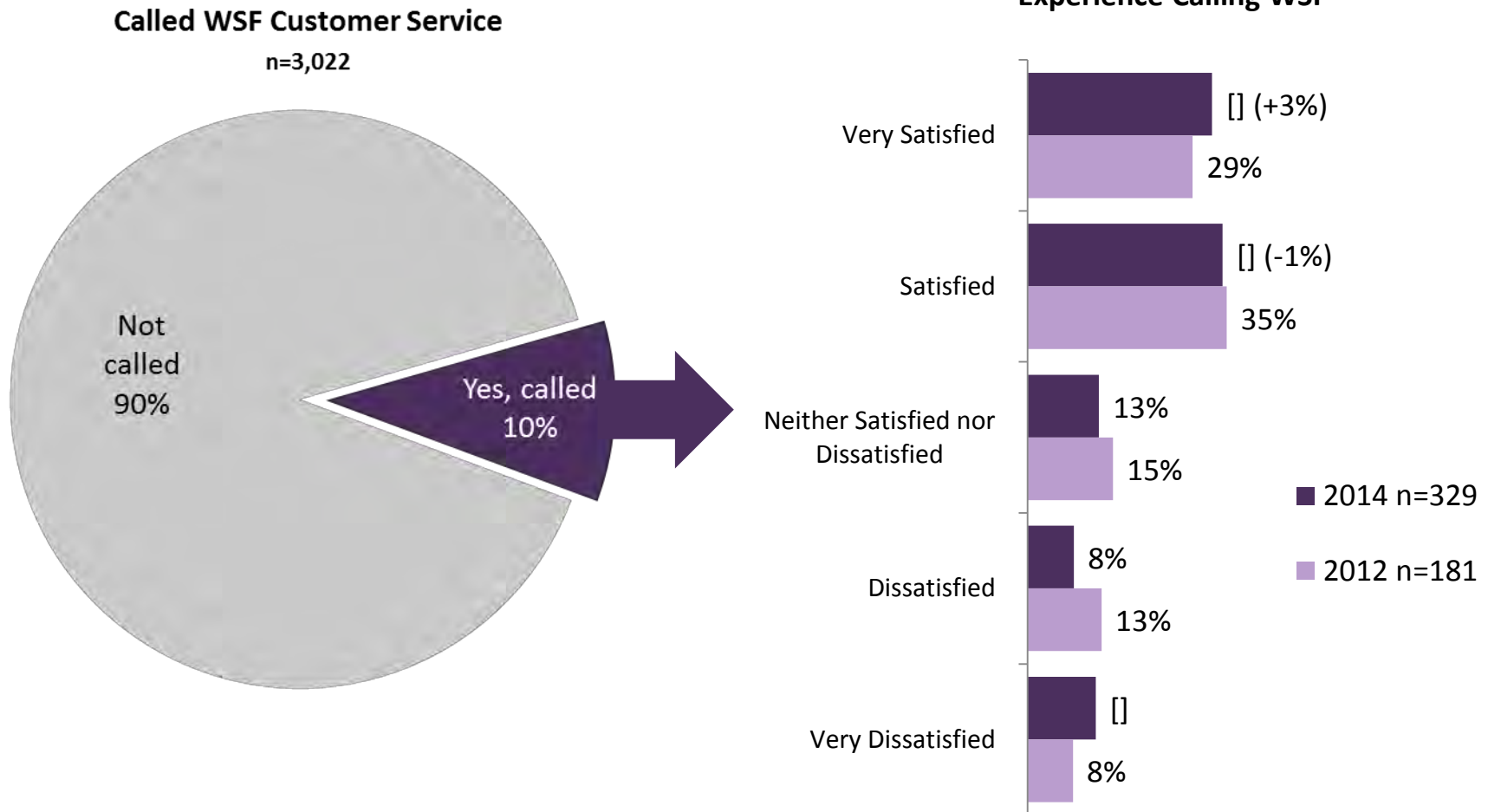


Q.67 What specifically about your experience with the WSF website made you dissatisfied? Please be as specific as possible. (n=171)

Calling WSF Customer Service by Phone



Very few respondents have contacted WSF customer service by phone. Of those respondents saying they have called, the majority are satisfied with their experience.



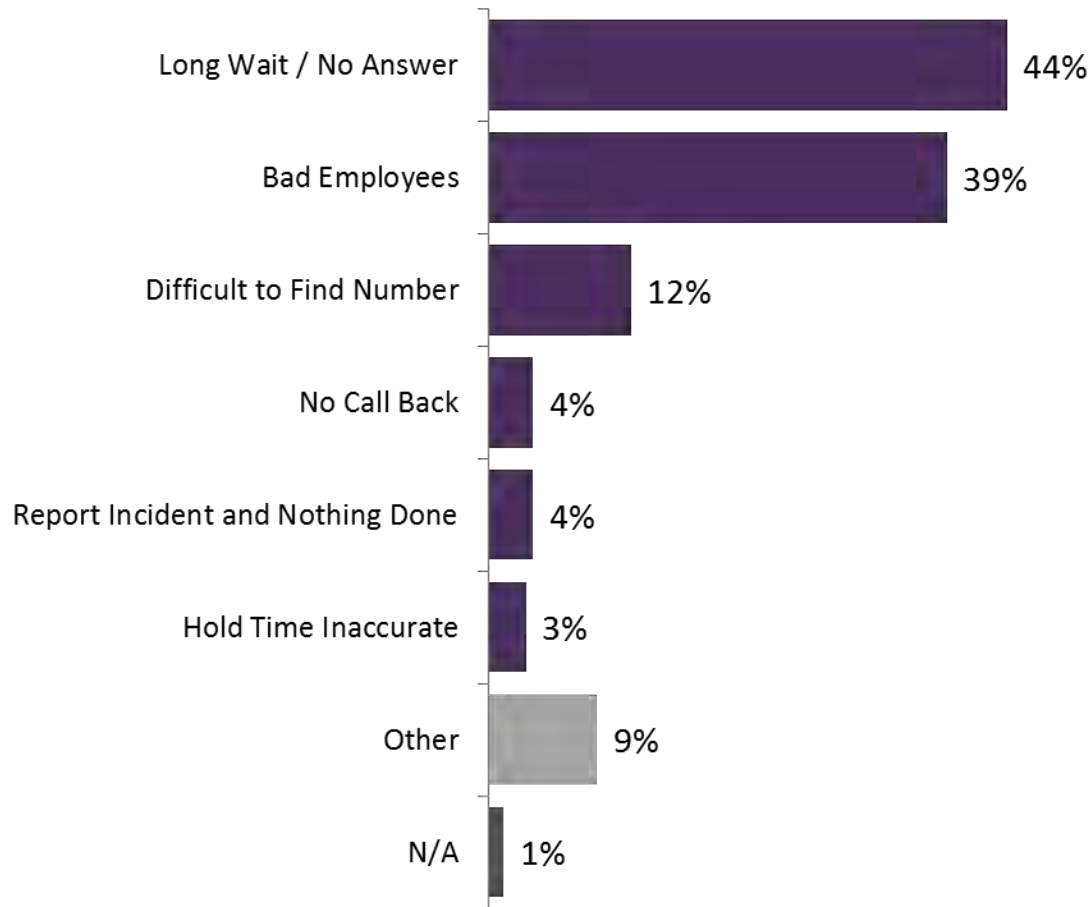
65B. During the Summer (June 15th through September 20th) period, have you for any reason called WSF by phone?

68. How satisfied were you with your experience calling the WSF by phone?

Phone Issues Mentioned



No answer or long wait times and bad customer service topped the list of phone complaints among people who are dissatisfied.



Q69 What specifically about your experience calling WSF by phone made you dissatisfied? (n=77)



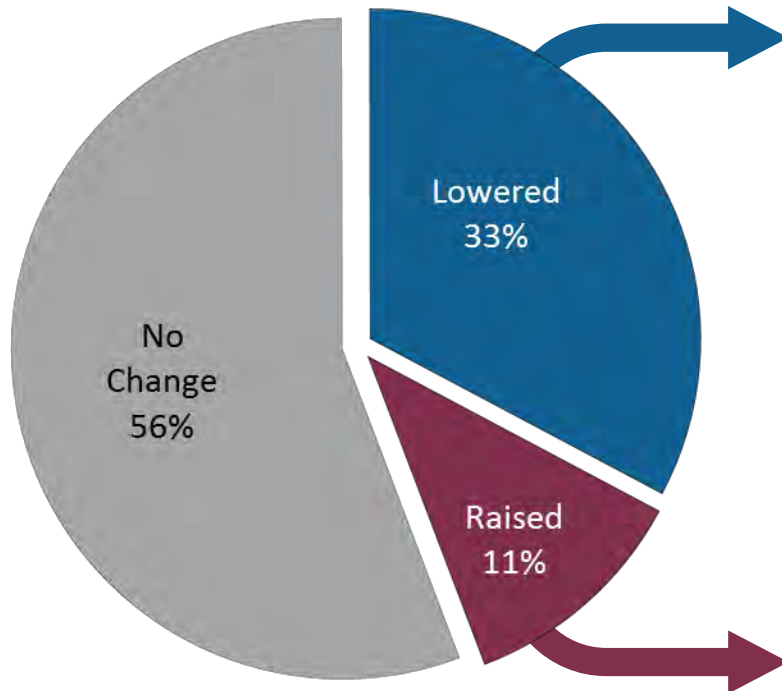
Miscellaneous Topics

Factors Driving Ferry Decision

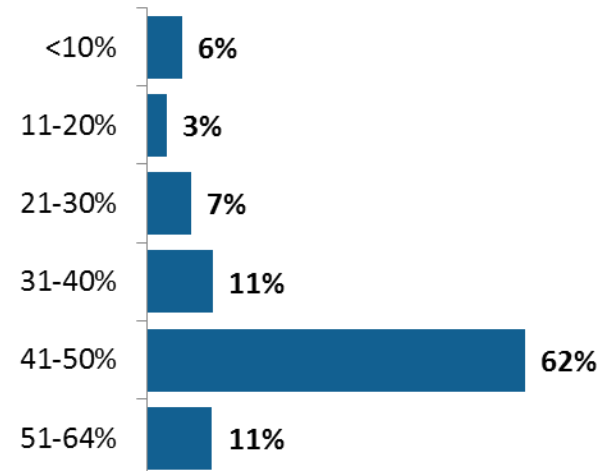


The majority say the 65% that is the rider paid percentage of daily operating costs should remain the same. One third say they should be lowered and only one-in-ten saying it should be raised.

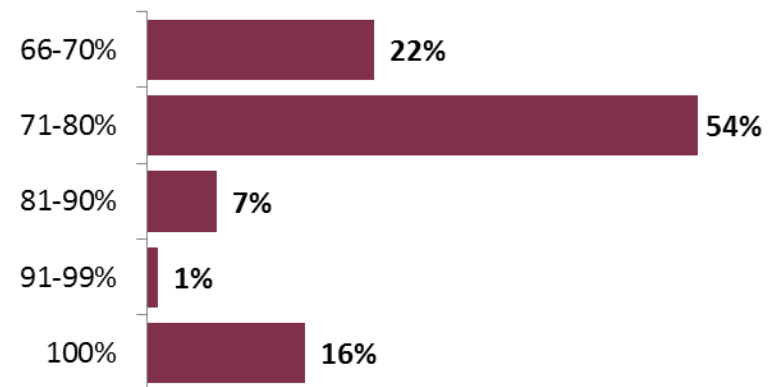
Rider Paid Operating %
n=3,028



Decreasing Rider-Paid % n=1,003



Increasing Rider-Paid % n=337

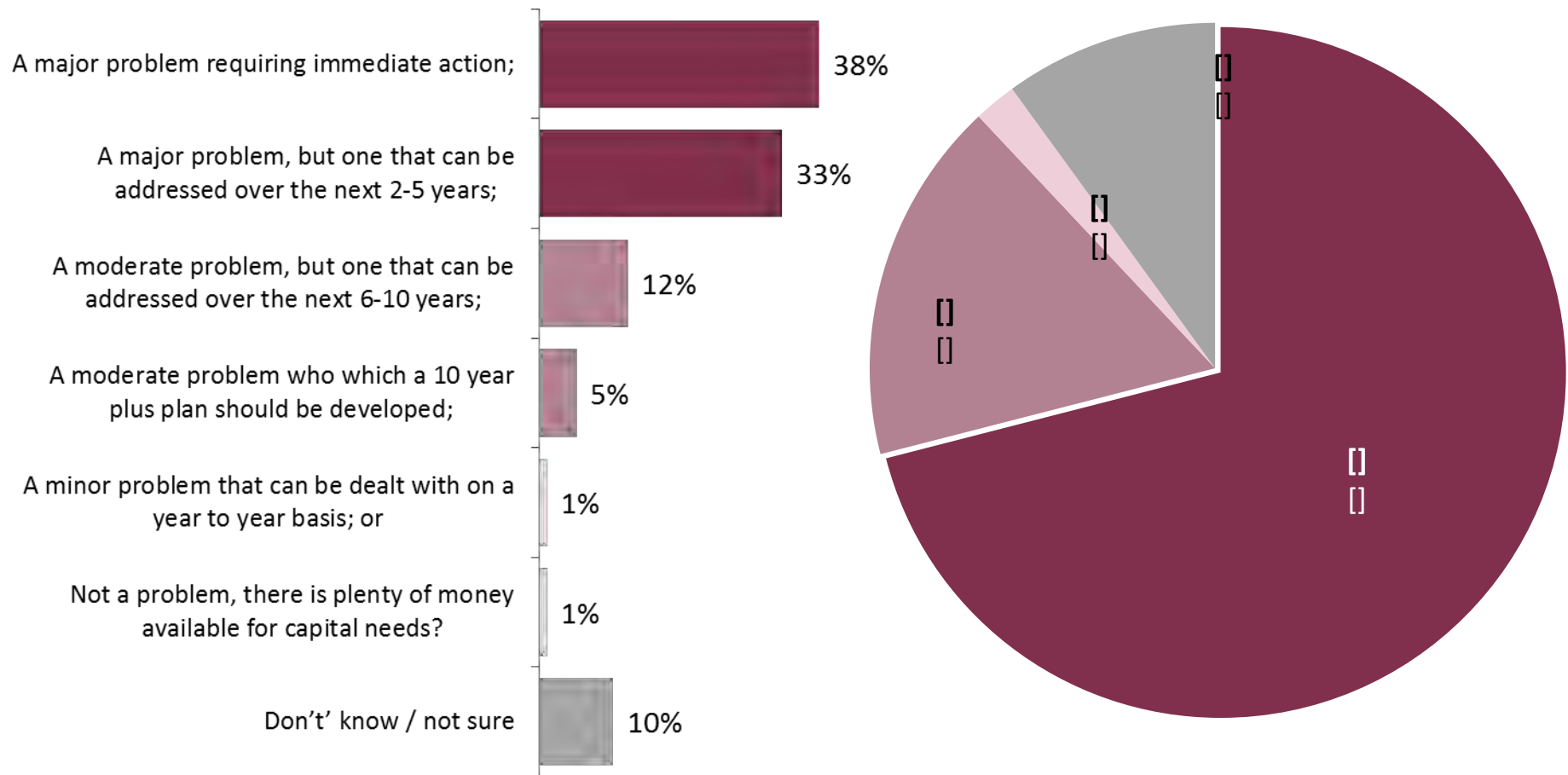


Q73. Should the 65% that is the rider paid percentage of the daily operating costs be raised, lowered or remain the same
Q73a/b. What percent should it be raised/lowered to?

Capital Funding for WSF



71% of respondents say funding for WSF capital needs is a major problem, with over a thirds (38%) saying the need requires immediate action.

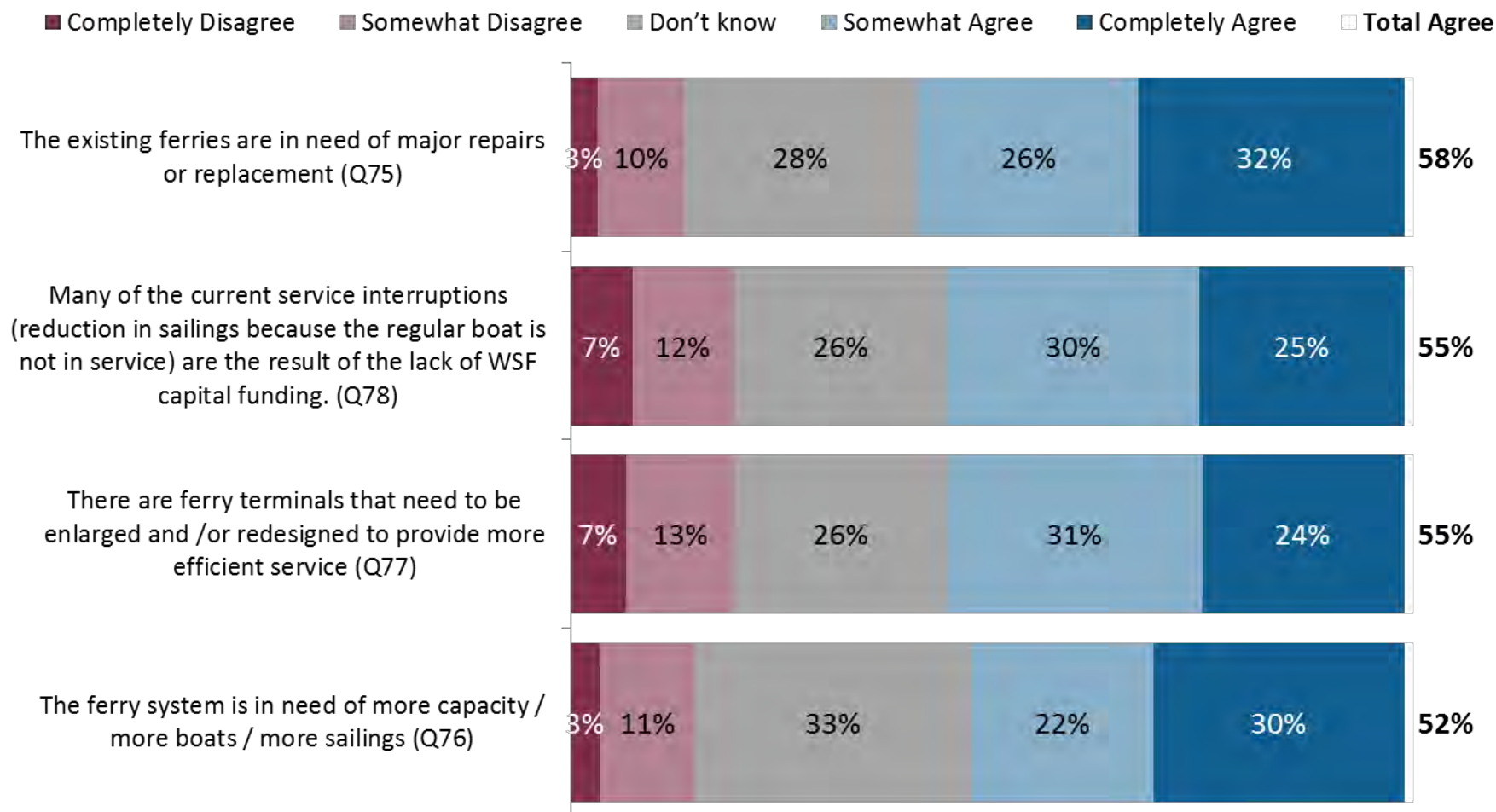


Q74. Since capital funding isn't covered by ferry fares, how big a problem, if any, do you think funding for WSF capital needs are? Would you say the WSF capital funding problem is ... (n=3,028)

Agreement Statements



The majority of respondents agree with statements around funding needs for capital and maintenance issues. Few respondents disagree, however a quarter to a third of respondents say they don't know.

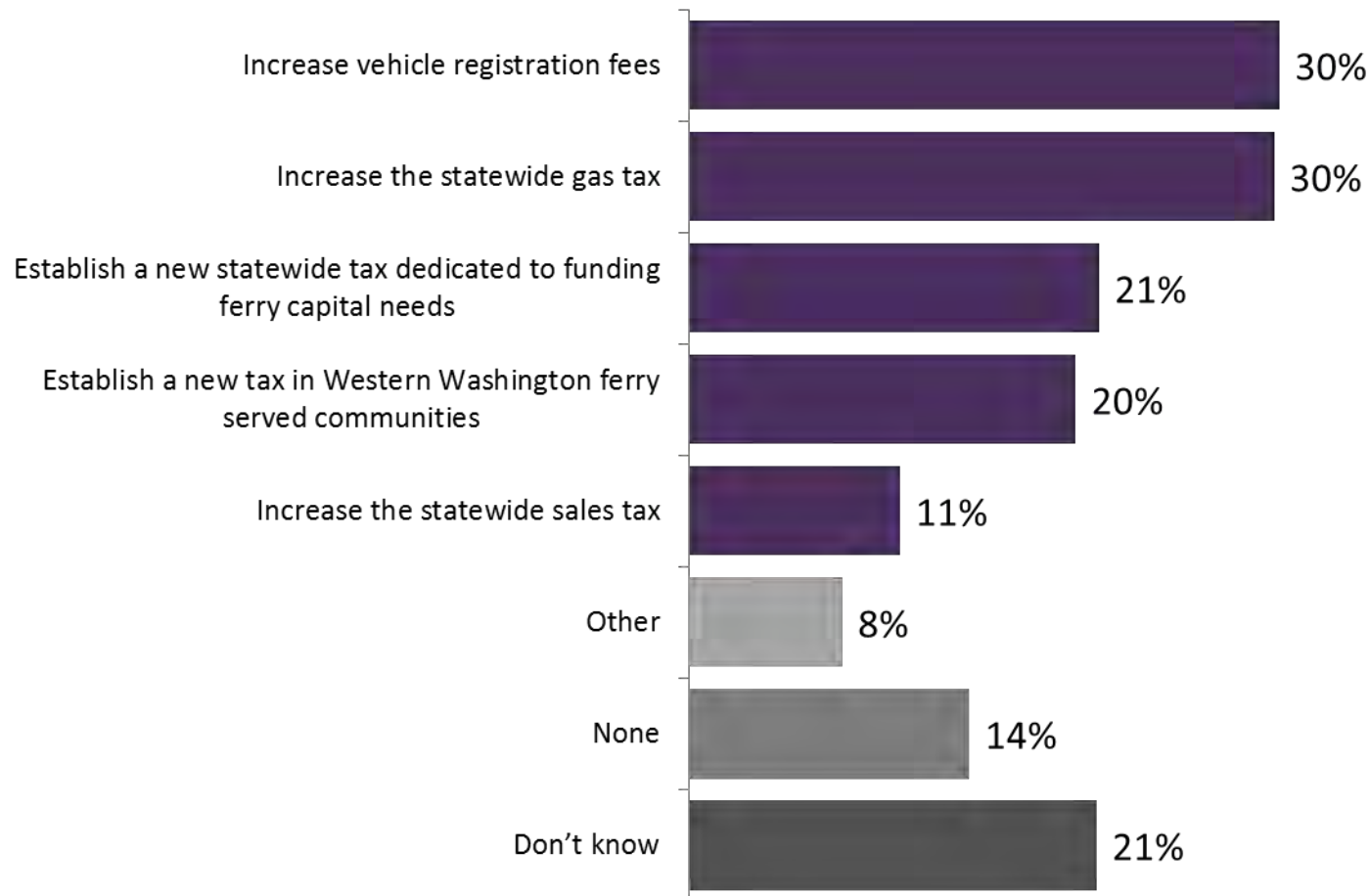


Q75-Q78. How much do you agree or disagree with each of the following statements? (n=3,028)

Suggested Funding Methods



Increasing vehicle registration along with increasing the statewide gas tax were the methods of funding capital needs most recommended by respondents.

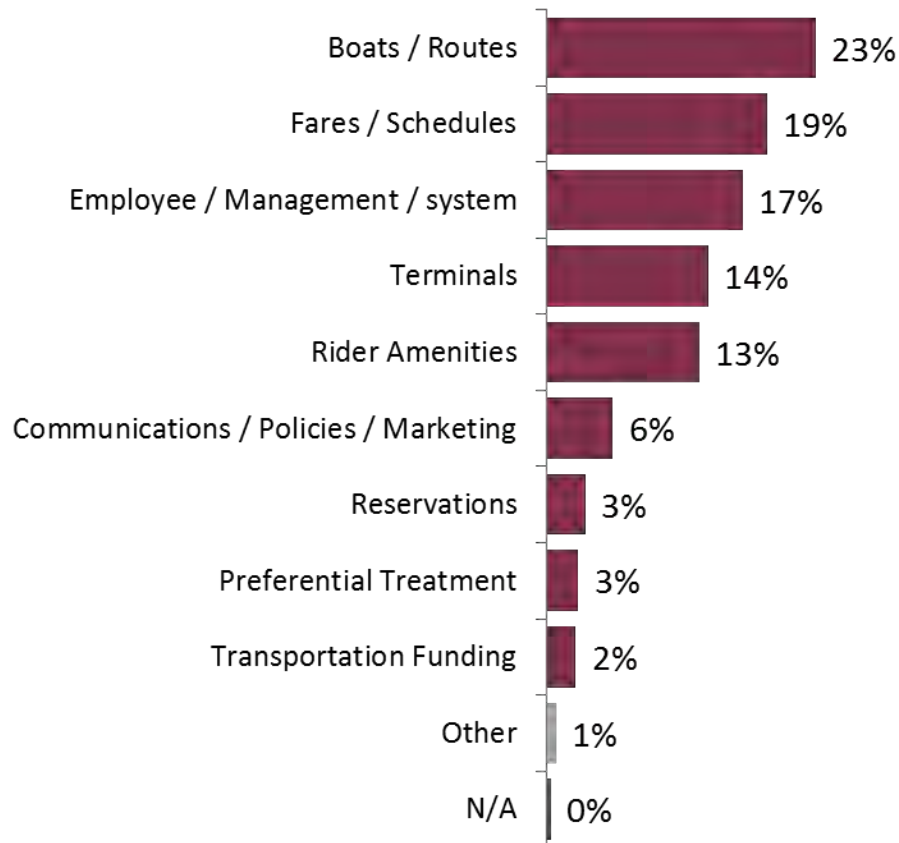


Q79. Which of the following funding methods, if any, would you recommend be used to fund the capital needs of the ferries? Please check as many as you like to see used (n=3,028)

Suggested Areas to Improve Service*



Responses containing "boats" and "Routes" are suggested the most



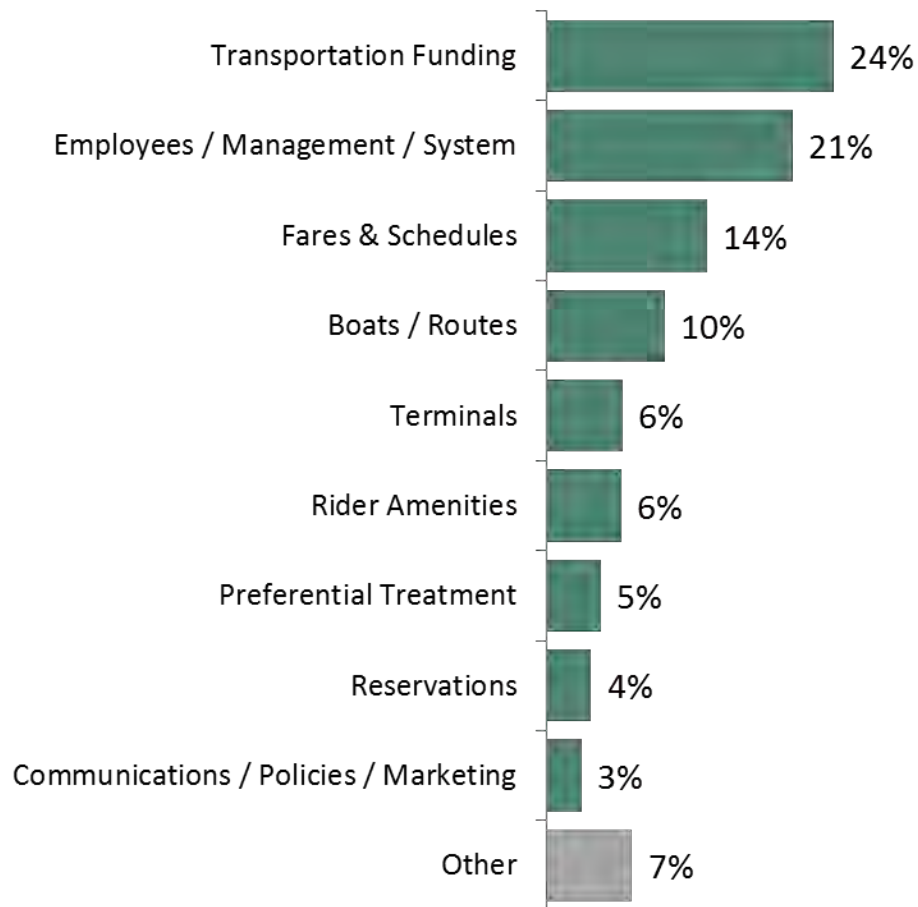
Q70 Beyond lowering fares, what other suggestions might you give WSF and state decision makers that would improve or strengthen WSF customer service (n=2,241)

**Data is unweighted, and includes responses past the end date of the summer ferry survey period.*

Additional Issues Mentioned*



The top three categories center around funding and management of WSF



Q80 Do you have any additional thoughts regarding the ferry system you would like to share? (n=1,026)

*Data is unweighted, and includes responses past the end date of the summer ferry survey period.



Demographics

Years Riding the Ferries



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	3,028	685	258	63	371	230	128	19	115	603	487	46	23
< one year	1%	1%	1%	0%	0%	0%	0%	0%	3%	0%	0%	0%	3%
1 to <3 years	4%	5%	8%	0%	3%	4%	3%	5%	1%	4%	2%	3%	0%
3 to <6 years	5%	6%	8%	5%	6%	5%	8%	5%	3%	5%	3%	0%	0%
6 to <10 years	7%	8%	9%	3%	6%	6%	7%	15%	6%	8%	6%	11%	3%
10+ years	83%	80%	74%	92%	85%	86%	82%	75%	87%	83%	89%	86%	94%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	1,680	438	158	54	242	124	60	11	51	301	159	18	13
< one year	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
1 to <3 years	1%	2%	1%	0%	<1%	2%	1%	0%	2%	<1%	1%	0%	0%
3 to <6 years	6%	6%	13%	6%	5%	3%	13%	18%	5%	4%	5%	0%	27%
6 to <10 years	17%	17%	29%	17%	15%	12%	22%	9%	11%	14%	13%	5%	6%
10+ years	76%	75%	57%	76%	79%	82%	64%	73%	81%	81%	82%	95%	67%

Years riding ferry

Rider Satisfaction with WSF



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	3,027	685	258	63	371	230	128	19	115	602	487	46	23
Total Satisfied	60%	62%	62%	61%	63%	46%	57%	48%	74%	62%	52%	49%	65%
Extremely Satisfied	25%	25%	27%	31%	30%	11%	22%	22%	46%	27%	15%	20%	23%
Somewhat Satisfied	35%	37%	35%	29%	33%	34%	35%	26%	28%	35%	37%	29%	42%
Neither	10%	11%	10%	15%	9%	10%	14%	12%	4%	9%	10%	13%	15%
Somewhat Dissatisfied	20%	17%	21%	14%	16%	27%	23%	22%	11%	21%	28%	21%	9%
Extremely Dissatisfied	10%	10%	8%	10%	11%	17%	6%	18%	10%	8%	10%	13%	12%
Total Dissatisfied	30%	27%	29%	24%	28%	44%	29%	40%	22%	29%	38%	34%	20%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	2,248	600	209	65	373	183	76	12	85	380	212	22	29
Total Satisfied	67%	72%	70%	66%	69%	70%	76%	47%	73%	58%	59%	58%	86%
Extremely Satisfied	34%	38%	29%	18%	40%	32%	33%	19%	54%	29%	22%	6%	53%
Somewhat Satisfied	34%	34%	41%	48%	29%	38%	43%	28%	19%	29%	37%	51%	32%
Neither	9%	9%	9%	17%	8%	9%	10%	1%	5%	13%	7%	6%	3%
Somewhat Dissatisfied	13%	10%	11%	7%	11%	13%	9%	17%	9%	19%	24%	15%	11%
Extremely Dissatisfied	9%	8%	8%	10%	10%	7%	5%	34%	10%	10%	11%	21%	0%
Total Dissatisfied	23%	19%	20%	17%	22%	21%	15%	52%	20%	29%	34%	36%	11%

Q20. All things considered, how satisfied are you with the service provided by Washington State Ferries during the Summer period

Value of Riding WSF



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	2,958	673	257	62	359	227	125	19	101	588	482	46	19
Total Good Value	58%	64%	65%	44%	61%	45%	56%	58%	67%	57%	42%	34%	62%
A Very Good Value	17%	19%	21%	12%	18%	14%	19%	0%	27%	14%	11%	2%	29%
A Good Value	41%	45%	44%	32%	43%	31%	37%	58%	40%	43%	31%	32%	33%
Neither	30%	27%	26%	42%	26%	39%	34%	23%	24%	32%	40%	39%	32%
A poor Value	9%	8%	7%	13%	11%	11%	8%	19%	6%	8%	13%	14%	3%
A Very Poor Value	2%	1%	2%	2%	2%	3%	1%	0%	2%	2%	4%	10%	3%
Total Poor Value	11%	9%	8%	14%	13%	15%	10%	19%	8%	11%	17%	24%	7%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	1,683	441	159	54	243	124	60	11	50	300	159	18	13
Total Good Value	53%	57%	52%	29%	54%	43%	61%	63%	74%	50%	45%	51%	94%
A Very Good Value	14%	15%	16%	5%	13%	10%	18%	18%	37%	12%	9%	10%	39%
A Good Value	39%	41%	36%	24%	41%	32%	42%	45%	37%	38%	36%	41%	55%
Neither	35%	32%	37%	39%	30%	43%	26%	28%	20%	41%	42%	25%	6%
A poor Value	10%	9%	7%	30%	11%	12%	10%	9%	3%	8%	9%	21%	0%
A Very Poor Value	2%	2%	3%	2%	3%	3%	3%	0%	3%	1%	4%	3%	0%
Total Poor Value	12%	11%	10%	32%	14%	15%	13%	9%	7%	9%	13%	24%	0%

Considering your personal experiences with the ferries, which of the following best describes the value, to you, of riding WSF?

WSF Focus on People vs. Vehicle Mover



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	2,958	673	257	62	359	227	125	19	101	588	482	46	19
People-Mover System	23%	11%	12%	35%	29%	28%	27%	18%	18%	31%	35%	48%	16%
Both equally	56%	61%	45%	55%	56%	57%	48%	32%	64%	57%	53%	41%	58%
Vehicle-Mover System	21%	29%	42%	8%	15%	14%	24%	45%	14%	11%	11%	11%	22%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	1,683	441	159	54	243	124	60	11	50	300	159	18	13
People-Mover System	25%	14%	14%	31%	27%	28%	36%	35%	27%	34%	40%	16%	27%
Both equally	50%	51%	38%	53%	55%	50%	41%	27%	56%	52%	46%	72%	34%
Vehicle-Mover System	24%	34%	48%	14%	18%	21%	23%	37%	17%	13%	14%	13%	39%

WSF is currently both a vehicle and people mover. In the future and in order to become a more efficient system, should WSF focus its improvements on becoming primarily a people-mover or a vehicle-mover system?

Distance From Ferry



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	2,944	673	254	61	256	226	125	19	99	586	481	45	19
< 1 Mile	7%	9%	9%	10%	4%	8%	3%	0%	3%	3%	8%	10%	7%
1-5 Miles	30%	39%	42%	27%	22%	31%	41%	42%	21%	20%	26%	32%	20%
6-10 Miles	29%	25%	26%	39%	23%	40%	38%	49%	15%	36%	30%	41%	10%
11-20 Miles	19%	15%	15%	15%	25%	19%	12%	5%	13%	26%	17%	10%	25%
20+ Miles	16%	12%	8%	10%	27%	2%	6%	5%	48%	15%	18%	7%	38%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	1,642	427	153	52	237	124	59	11	50	295	155	18	13
< 1 Mile	5%	7%	9%	6%	6%	8%	0%	1%	4%	2%	5%	5%	0%
1-5 Miles	32%	44%	40%	38%	19%	27%	40%	18%	21%	21%	33%	35%	39%
6-10 Miles	29%	26%	25%	32%	25%	43%	36%	54%	16%	34%	28%	24%	33%
11-20 Miles	18%	11%	16%	20%	21%	22%	14%	18%	17%	27%	16%	26%	28%
20+ Miles	15%	12%	9%	3%	28%	1%	9%	9%	42%	15%	17%	8%	0%

Approximately how many miles do you live from the ferry terminal

Age



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	1,898	448	172	33	229	124	83	13	87	362	298	29	20
18-24	1%	2%	2%	4%	1%	2%	0%	0%	0%	1%	1%	0%	0%
25-34	6%	5%	15%	0%	8%	5%	4%	0%	4%	3%	2%	1%	3%
35-44	12%	13%	21%	9%	10%	12%	13%	9%	9%	10%	12%	10%	6%
45-54	20%	21%	23%	27%	16%	21%	24%	29%	16%	16%	20%	15%	31%
55-64	30%	30%	22%	31%	34%	28%	31%	55%	32%	32%	30%	41%	28%
65+	31%	29%	17%	30%	31%	33%	29%	7%	39%	39%	35%	33%	32%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	732	199	73	19	18	45	29	2	24	131	57	7	8
18-24	2%	4%	3%	5%	0%	0%	0%	0%	0%	3%	0%	0%	0%
25-34	6%	7%	15%	0%	4%	1%	6%	50%	5%	5%	6%	0%	0%
35-44	13%	11%	22%	5%	18%	8%	19%	50%	14%	7%	17%	0%	0%
45-54	22%	24%	21%	32%	23%	20%	22%	0%	18%	21%	16%	21%	31%
55-64	31%	31%	23%	31%	25%	45%	43%	0%	40%	35%	31%	27%	0%
65+	25%	24%	16%	28%	30%	25%	11%	0%	23%	30%	31%	51%	25%

Gender



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	3,019	653	258	63	370	228	128	19	113	602	486	46	23
Male	53%	59%	48%	51%	50%	53%	53%	72%	50%	51%	48%	36%	71%
Female	46%	41%	50%	48%	50%	46%	43%	28%	45%	46%	51%	61%	29%

Onboard - 2014	TOTAL
Male	51%
Female	49%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	1,712	447	164	54	248	126	61	11	52	304	159	18	14
Male	52%	55%	52%	47%	54%	50%	54%	63%	54%	53%	37%	49%	49%
Female	48%	45%	48%	53%	46%	50%	46%	37%	46%	47%	63%	51%	51%

Onboard - 2012	TOTAL
Male	47%
Female	53%

Please indicate your gender

Cell Phone Reliance



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	2,977	678	256	62	360	227	127	19	105	593	485	46	19
All the time; it's my only phone	22%	23%	42%	23%	23%	22%	25%	32%	21%	12%	14%	7%	7%
All the time; still have a land line	28%	32%	21%	25%	25%	33%	34%	29%	25%	31%	24%	29%	10%
A great deal; it's my primary phone	12%	12%	10%	15%	13%	11%	19%	28%	11%	13%	10%	7%	32%
Some; I use it occasionally	22%	20%	15%	24%	23%	21%	15%	11%	21%	26%	28%	25%	29%
Very little	9%	7%	7%	8%	9%	7%	3%	0%	8%	10%	15%	21%	13%
Do not have a cell phone	3%	2%	1%	3%	3%	2%	1%	0%	3%	3%	6%	4%	3%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	1,659	430	153	52	242	125	60	11	51	299	158	18	13
All the time; it's my only phone	11%	11%	8%	21%	7%	10%	11%	1%	12%	11%	20%	18%	0%
All the time; still have a land line	25%	22%	20%	25%	24%	26%	17%	18%	30%	27%	35%	18%	19%
A great deal; it's my primary phone	11%	12%	9%	15%	12%	11%	20%	18%	6%	12%	8%	10%	0%
Some; I use it occasionally	27%	32%	22%	16%	26%	31%	28%	9%	22%	32%	24%	32%	0%
Very little	17%	17%	33%	19%	20%	18%	23%	45%	15%	12%	5%	0%	21%
Do not have a cell phone	4%	3%	2%	0%	6%	2%	1%	9%	6%	2%	5%	19%	60%

How much do you rely on your cell phone? Would you say you rely on your cell phone...

Employment Status



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	2,975	678	256	61	360	227	127	19	105	593	485	45	19
Employed full-time	53%	57%	72%	55%	49%	59%	66%	77%	38%	44%	39%	43%	64%
Retired	24%	20%	13%	30%	27%	22%	17%	9%	30%	29%	31%	25%	20%
Employed part-time	12%	11%	6%	5%	14%	10%	6%	9%	10%	15%	16%	22%	7%
Homemaker	2%	3%	1%	3%	3%	1%	2%	0%	2%	2%	2%	0%	0%
Student/employed	1%	0%	2%	0%	1%	0%	0%	0%	0%	0%	1%	0%	0%
Student/not employed	1%	2%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%
Not employed	2%	2%	2%	2%	3%	2%	3%	0%	7%	2%	2%	0%	0%
Other/Military	5%	4%	3%	5%	4%	5%	5%	5%	12%	7%	8%	10%	10%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	1,659	430	153	52	242	125	60	11	51	299	158	18	13
Employed full-time	55%	63%	78%	58%	54%	62%	79%	72%	35%	43%	37%	31%	19%
Retired	22%	16%	8%	29%	27%	17%	16%	10%	33%	31%	27%	23%	12%
Employed part-time	12%	10%	5%	5%	11%	10%	2%	9%	15%	15%	23%	27%	15%
Homemaker	2%	2%	0%	2%	1%	5%	2%	0%	1%	2%	4%	0%	0%
Student/employed	1%	1%	0%	0%	0%	1%	0%	9%	1%	1%	0%	0%	0%
Student/not employed	1%	1%	1%	0%	1%	0%	0%	0%	0%	<1%	2%	0%	0%
Not employed	2%	2%	0%	2%	3%	1%	1%	0%	3%	1%	2%	0%	0%

What is your current employment status

Annual Household Income



Summer - 2014	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents	2,950	673	256	61	358	226	125	19	99	587	481	46	19
Under \$15,000	1%	1%	3%	2%	2%	0%	1%	0%	2%	1%	1%	7%	3%
\$15,000-\$24,999	2%	1%	1%	0%	3%	0%	0%	0%	2%	2%	5%	3%	3%
\$25,000-\$34,999	4%	2%	4%	5%	3%	4%	6%	5%	9%	4%	6%	7%	0%
\$35,000-\$49,999	7%	6%	7%	5%	8%	6%	10%	6%	3%	7%	9%	14%	29%
\$50,000-\$74,999	14%	10%	16%	30%	14%	12%	14%	11%	22%	15%	16%	11%	3%
\$75,000-\$99,999	14%	13%	17%	12%	15%	11%	13%	11%	13%	15%	13%	14%	0%
\$100,000-\$149,999	17%	21%	23%	13%	19%	20%	26%	26%	8%	12%	9%	14%	7%
\$150,000 or more	16%	22%	12%	6%	14%	19%	15%	15%	8%	15%	14%	7%	16%
Refused	25%	24%	17%	27%	22%	27%	13%	26%	33%	29%	27%	21%	38%

Summer - 2012	TOTAL	SEA/ BAIN	SEA/ BRE	PTD/ TAH	EDM/ KIN	FAU/ VAS	FAU/ SOU	SOU/ VAS	COU/ PTT	MUK/ CLI	ANA/ SJI	INTER SJI	ANA/ BC
Respondents													
Under \$15,000	1%	2%	2%	0%	<1%	1%	2%	0%	1%	2%	<1%	3%	0%
\$15,000-\$24,999	2%	1%	1%	6%	2%	3%	0%	0%	8%	3%	2%	21%	0%
\$25,000-\$34,999	4%	4%	5%	5%	3%	4%	2%	18%	8%	3%	6%	5%	12%
\$35,000-\$49,999	7%	5%	4%	13%	6%	7%	4%	18%	17%	7%	12%	5%	0%
\$50,000-\$74,999	14%	11%	15%	21%	15%	10%	17%	0%	14%	17%	17%	13%	0%
\$75,000-\$99,999	16%	12%	19%	13%	19%	13%	16%	54%	13%	17%	18%	20%	27%
\$100,000-\$149,999	19%	21%	21%	25%	19%	22%	32%	0%	17%	15%	11%	7%	15%
\$150,000 or more	15%	23%	15%	6%	13%	18%	10%	0%	7%	12%	12%	3%	12%

Which of the following best describes your total annual household income before taxes?